



All Good Things

Nonprofit Representative Payee Organization

### **Representative Payee Intake Process**

Typically, this is how it works:

- Client Referral form is filled out completely by the referring person, case manager, or social worker and returned to All Good Things. The client should be told that this is a fee for service program.
- Please attach a **copy of the client's photo identification** and **Social Security card** to the mailed referral form.
- If the client has never had a payee, the SSA-787 form will need to be completed by a physician or psychiatrist to submit to Social Security with the application that All Good Things will submit.
- If the client has a guardian, we will need a copy of the guardianship papers to submit as well.
- The intake meeting is at the referring agency's office, via Zoom, or as scheduled in our office or another space with the client and supportive staff. We complete paperwork and explain the program to the client.
- Upon the approval of Social Security, each client's SSA/SSI/SSDI benefits will come directly to the All Good Things (AGT) client account.
- We will then schedule a budget meeting with the client (and support team).
- At the budget meeting, we discuss and organize all client bills and expenses and create an individual budget. This budget includes weekly spending money.
- All client bills to be paid by AGT must come to the AGT P.O. Box, still in the client's name, to ensure timely payment. We require the client and support people ensure that the billing addresses are changed. The paid bills will be kept in each client's folder.
- We strongly encourage each client to have a savings, even if only a small amount, to have a cushion.
- Clients personal money will be transferred to a prepaid debit card or directly into his/her personal checking account each Monday (if a holiday, Tuesday).
- Requests for extra money need to be made by **12:00pm** on **Thursday** to receive the following Monday or Tuesday. Any requests of \$100 or more require the client to provide receipts.
- Emergency requests are decided upon on a case-by-case basis.
- The client is hiring AGT to manage her/his money and this is a completely voluntary program, we are here to help reduce stress, not create more. If a client is unhappy she/he can apply to become their own payee, or choose another payee at any time.

All Good Things (AGT) provides financial stability for vulnerable community members to help them remain safely housed and have money throughout the month. We also connect out clientele to community resources to aid in holistic support. Please let us know if you have any questions.