



Representative Payee Program Guidelines

Agape In Motion Incorporated is pleased to offer Representative Payee Program services to you. By entering into this agreement, we will adhere to the following guidelines during our service to you as your payee.

We will gather important information about your income, expenses and current money management practices. To ensure timely transition into the program, please complete, sign, and return all requested forms, along with all supporting documents to AIM in a timely manner. Your application will not be submitted to the SSA if all necessary documents have not been submitted to AIM.

Personal Funds

- ✓ Personal funds are distributed **twice (2) monthly, three (3) times monthly** or **weekly**. This is determined when your initial budget is planned and can only be changed after 6 months. If you receive a personal funds check twice a month, you pick up a check at the beginning of the month and in the middle of the month. If you receive a personal funds check three times a month, you pick up a check on specified dates during the month. If you receive a check weekly, you will pick up your check every Wednesday. The amount of your personal check is set after your budget is in place and is determined by your need and/or the amount of funds available.
- ✓ You may request a monthly print-out of your account.
- ✓ We cannot repay personal loans. If you borrow money from a friend or relative, you must repay that from your personal spending check.
- ✓ AIM will not approve the purchase of firearms or weapons of any kind.
- ✓ All check pick-ups and business matters that need to be handled **IN OFFICE** must be done before 2:00 p.m. If another person is designated to pick up for you, a form must be signed **IN PERSON** by yourself and the person **BEFORE** this can happen; and the person designated must have current picture identification.
- ✓ *Receipts for Personal Funds Received (For SSI/SSDI Beneficiaries ONLY)*
ALL persons receiving SSI/SSDI benefits will have to account for ALL funds issued for personal use. This will be done EACH time that you pick up a check by completing and signing a RECEIPT ACKNOWLEDGEMENT and by returning receipts for all monies received by check and/or gift card. AIM is not allowed to release personal funds if receipts are not returned for any previous check.

Conserved/Saved Funds

Twice a year, AIM will meet claimants at local stores to do personal shopping from conserved/saved funds. There are specific guidelines that are followed when these shopping trips are made. They are scheduled for the 3rd Friday in June and December. Information on the location, dates and times are given out the beginning of June & December. The beneficiary's Community Support Worker **must** be present on these shopping trips.

Check Requests, Special Purchases and/or Reimbursements

All check requests, special purchases or requests for reimbursement will take 7 to 10 days; due to processing time needed. **If any special purchase is not more than MONTHLY personal funds check (Food and Personal), the purchase must be made by the CLAIMANT and reimbursement will be made received AFTER the receipt is returned.**

Utility Payments

If AIM will be paying your utility bills, it is **YOUR** responsibility to have your bills sent directly to our office at 720 NORTH UNION, ST LOUIS MO 63108. If you choose to not have bills sent directly to our office and you incur late fees as a result of your bill not being paid in a timely manner, you cannot hold AIM responsible.

Ameren Missouri 314 342 1111 Spire (formerly Laclede Gas) 314 621 6960

Representative Payee Re-Selection

If you decide to seek payee services (through another agency, personal family member, friend or becoming your own payee) without any notice to AIM, your monthly fee for the month will not be refunded. Any funds that are saved or conserved will be returned to SSA on the date of the re-appointment unless previously noted. **Due to insurance regulations, AIM is not allowed to issue any checks to you or on your behalf AFTER the agency has been removed as your payee.**

Additional Important Policies

1. The beneficiary MUST appear in person **with** the Community Support Worker that is actively assisting the beneficiary. The CSW MUST be present at the initial appointment and MUST be present anytime the beneficiary comes to the office **for the first 90 days** once the appointment of representative payee is made by the SSA. If this commitment is not able to be carried out, AIM will not be able to serve as representative payee;
2. SSA will notify AIM when AIM has been appointed as payee. This documentation will also be sent to the beneficiary's address on file with the SSA. PLEASE NOTE: The SSA will not give any information regarding the application status until AIM is appointed payee;
3. Monthly budgets will be calculated, and household bills will need to be provided after AIM has been appointed payee by the SSA (lease, utility bills and other monthly obligations). This takes place during the first meeting AFTER AIM has received the beneficiary's 1st direct deposit.

Beneficiary (Claimant) Responsibility & Agreement

My signature below is an acknowledgement that I will be CLEAN AND SOBER when I come to the agency to conduct business, treat staff with courtesy and respect, come to conduct business only on days/hours that have been set up, sign for any checks that I come to pick up and contact the agency in the event my contact information changes (address or phone). In the event of an emergency, I understand that I must call to set up a time to come into the office. I understand that if I fail to comply with the above guidelines, my participation in the program can be terminated. Your signature is also an agreement that ALL OTHER SERVICES (food commodities, household/clothing items or financial assistance) received from AIM Inc is an agreement that the information you provide is accurate, food, household or clothing items will not be resold or returned to any store, and your acknowledgement that noncompliance with this policy could result in denial of future benefits from our agency.

AIM Staff Responsibility & Agreement

The staff and volunteers of Agape In Motion Inc will treat you respectfully, be available on scheduled days and hours to meet with you, use your monthly benefits to meet your current needs for housing, report to the SSA any events that may affect your eligibility for payments, account to the SSA how monies are spent or saved, save any unspent funds in a way that indicates the ownership of the funds, and will return to the SSA any funds that have been saved for you or to which AIM is not entitled.

*****This list of policies is not all inclusive and new policies may be updated as necessary*****