



Guidelines for Representative Payee Clients

1. Must be able to provide proper identification – photo identification and a social security card upon application.
2. Must sign a release of information consent as this will assist Connelly Law Offices, Ltd. to better serve you by allowing communication with mental health, social services, family members, landlords and social security.
3. Connelly Law Offices, Ltd. will request a copy of a biopsychosocial assessment, if available, to better understand why we have been requested to a representative payee.
4. It is the responsibility of the case manager/counselor and you to provide the billing addresses of all vendors (i.e. Metro PCS, etc.) that Connelly Law Offices, Ltd. will be responsible for submitting a payment.
5. All questions for Connelly Law Offices, Ltd. are to be directed to your case manager/counselor. Please contact them about any questions or concerns you may have regarding payments. For example, questions about amounts or bills to be paid. **Remember, this is an automated system** and any calls to us will only result in a referral back to your case manager/counselor for any budget adjustments.
6. Your case manager/counselor will be responsible for providing Connelly Law Offices with any changes in payments or personal expenses to be paid. This is expected to be done monthly using our budget worksheet that we provide.
7. Special requests for funds must be made by your case manager/counselor only. Not all special requests can be approved.
8. If a new case manager/counselor is assigned, Connelly Law Offices, Ltd. must be notified immediately otherwise this could result in a delay of payment and release of funds to you.
9. Everyone receiving representative payee services are required to follow the guidelines and terms of the case manager/counselor and Connelly Law Offices, Ltd. Remember, all representative payees hold a responsibility to the funding authority and all monies must be spent in the best interest of the client.
10. Your inability to cooperate with the terms and conditions of our representative payee services may result in termination from our program.