



# DBH / BFC

## Representative Payee Program

Information for CSA Community Support Workers

Bread for the City (BFC) is the organizational payee contracted to provide representative payee services to DBH consumers. Community Support Workers at the any DBH Core Service Agency can refer a consumer to the Representative Payee Program (RPP). The referral begins collaboration between the Core Service Agency and BFC to assist consumers in maintaining benefit eligibility and managing funds. Please see the Bread for the City website [www.BreadForTheCity.org](http://www.BreadForTheCity.org) for further details and links to our forms.

### Referral & Enrollment

Referral & Enrollment in the Rep Payee Program is a multi-step process – when you submit the referral form your consumer is not yet enrolled in the program.

1. Complete a referral form with as much detail as possible - the form is available online at <https://breadforthecity.org/social-services/#representative-payee-program>
2. Email SSA-787, proof of income, and enrollment packet to [RPPrefer@breadforthecity.org](mailto:RPPrefer@breadforthecity.org)
3. We will reach out to schedule an enrollment meeting for you and the consumer to meet with a BFC RPP Coordinator.
4. At the enrollment meeting:
  - Review consumer rights & responsibilities
  - Review the roles of the CSA Community Support Worker & the RPP Staff
  - Review and sign an RPP contract
  - Review and sign SSA paperwork to select BFC as payee
  - Begin discussing Budget & Spending Plan
5. BFC will submit application to the Social Security Administration at our next regular appointment.
6. Most common reasons for delays: Incomplete enrollment forms / missed enrollment appointments at BFC/ benefit eligibility issues → might require additional forms.

### Budgeting

Consumers' monthly expenses are paid on the basis of the **Budget and Spending Plan**, which lists all recurring payments – rent, utility bills, insurance premiums or medication co-pays, spending money, etc – that will be issued within each calendar month.

1. CSA Community Support Worker updates the Budget & Spending Plan **every 180 days** or more often if needed (any time consumer moves, rent payment changes, or other financial needs change).
2. Please inform BFC of needed changes ASAP – for example, if you anticipate that your consumer will be moving on the first of the month ask us to STOP or HOLD rent to the current landlord BEFORE the first of the month.
3. Consider the effect that a 5<sup>th</sup> weekly check or other variable expenses such as utility bills will have on your consumer's budget.
4. BFC RPP staff can provide budgeting assistance to Community Support Workers and consumers.

### Moves & Changes in Living Situation

All moves should be reported to BFC immediately by completing the Change of Address Form available on our website. This form must include complete details including the date of the move, residential address, mailing address, and landlord information if any. Also use the form to document admissions to/discharge from the hospital, confinement/release from incarceration, and the date a consumer becomes homeless. This form must be provided before rent can be paid to a new landlord. Also provide additional documentation as required by the specific situation, including:

- Hospital discharge paperwork
- Proof of release from incarceration
- Lease or other rental agreement
- CRF/OSP verification via DBH/DHCF

## **Additional Requests for Funds**

1. Consumers will need to make all requests for additional funds outside of their regular Budget & Spending Plan through a CSA clinical team member.
2. If a consumer requests money for a special expense that you believe to be an appropriate use of funds and which fits into the consumer's budget, you can submit a request for an additional disbursement using the form provided on our website.
3. The BFC Coordinator and/or Accounting Coordinator will review the request to be sure that the consumer has funds available and will process the request.
4. If funds are not available, BFC staff will contact the CSA team member by telephone.
5. Checks for additional funds will be available within 48 hours of the request.
6. **Up to two (2)** additional requests will be allowed per calendar month for special circumstances. These include: birthdays, holidays, clothing, major items (TV, radio, etc) as well as additional requests paid to vendors (commercial entities) for services rendered/goods received. *Spending money, personal needs, and personal expenses* are not considered special circumstances. If your consumer is in need of additional spending money during the month, please review their budget with them for appropriateness.
  - **Additional Disbursement Request Form (ADRF)** must be submitted to BFC with a clear description of the expense and include all of the signatures required from CSA team.
  - If applicable, attach supporting documentation such as: vendor invoices for payment, utility bills, rental verification, etc.
  - All relevant details (account number, vendor address, etc) should be provided on the ADRF **and ADRF must include signature of Immediate Supervisor .**
7. Other **emergency** requests will be considered on an individual basis and are not limited through the month but must follow the same submission guidelines as outlined above.
8. ADRF checks paid in the name of a **CSA staff member in any amount, or to the consumer or third party for checks \$250.00 or more** must include the signature of the Immediate Supervisor **and the Senior Administrator or his/her designee.**
  - These ADRF must include:
    - An invoice or estimate for future purchase from vendor
    - Or detailed description and cost estimate of items to be purchased
    - *And (if applicable)* statement from 3<sup>rd</sup> party re: intended use of funds and promise to return receipts.
  - Checks must be picked-up by or mailed to the Community Support Worker who will also receive a Receipts Tracker Form and will be responsible for the mandatory submission of receipts to BFC.
  - If receipts cannot be provided, a written statement detailing the use of the funds and lack of receipts must be provided. **This statement must include the signature of the Immediate Supervisor and the Senior Administrator or his/her designee.**
9. **Rent Payments:** All **new** rent payments should be verified by the CSW and supervisor, including input from the consumer for validity of address, landlord, and amount of rent.
  - Along with any ADRF or budget plan that requests a rent payment or security deposit that has never been made by BFC on consumer's behalf previously, the CSW must submit:
    - A **Change of Address Form** that provides complete details of the address, move-in date, living situation, and contact information for the landlord including phone number.
    - If available, a copy of the lease, CRF contract, or other documentation of the rental agreement.
  - All ADRFs for rent payments and security deposits and 90 Day Budgets must be signed by the CSW and **Immediate Clinical Supervisor.**

- CSWs must report to Bread for the City immediately in writing if the consumer did not move into the property on the move-in date as anticipated.
- CSWs must report to Bread for the City immediately in writing when the consumer moves out.

### **Maintaining Benefit Eligibility**

The CSA Case Managers' collaboration is essential in maintaining consumers' eligibility for benefits. We need your assistance in reporting changes that impact benefit eligibility and in responding to SSA requests for information to prove continued eligibility.

1. Report any changes (see below) as soon as they occur and with complete details – BFC's Benefits Supervisor meets with SSA weekly to report information. Timely reporting reduces overpayments and ensures that consumers are paid all benefits they are eligible for.
2. Periodically BFC will ask you to assist us in completing paperwork to prove continued eligibility for benefits – this includes information re: living arrangements, financial eligibility, and legal involvement as well as medical information. By responding to these requests in a timely manner and with maximum attention to detail we will avoid any interruption of benefits.
3. This is particularly important for SSI recipients as the eligibility rules are very stringent!

### **THESE CHANGES MUST BE REPORTED IMMEDIATELY:**

1. Moves or address changes
2. Changes in household composition such as marriage or separation from a spouse, anyone moving into or out of the household, etc.
3. Work activity – providing pay stubs regularly greatly reduces overpayments
4. Consumer begins receiving any other income, the amount of other income changes, or the consumer receives other funds or items of value that can count as resources
5. Consumer plans to leave Washington, DC for 30 days or more
6. Consumer is imprisoned for a crime, is court ordered to St. Elizabeth's, or enters a court ordered drug treatment program
7. Consumer enters a hospital, nursing home, or other medical facility
8. Any other changes to the consumer's situation that might impact his/her benefits

### **Transfer or Discharge**

Please notify the Rep Payee Program immediately if you are planning to discharge a consumer or he/she is transferred to a new CSA Case Manager or team.

1. If you are receiving phone calls or statements for consumers who are no longer on your caseload, please inform us so that we can update our records.
2. We provide payee services to DBH consumers – if a consumer changes teams or CSAs we will continue to provide payee services. Please inform us of changes or ask the new Case Manager to contact us.
3. Consumers who are discharged from DBH are no longer eligible for the Rep Payee Program.
  - Please inform BFC **immediately** if you are beginning the process of disenrolling a consumer who is no longer actively engaged in treatment.
  - Planning for a new representative payee must be part of the discharge process – please inform Bread for the City of a planned discharge (such as due to nursing home placement or move out of state) and we will work together to make sure that other payeeship arrangements can be put into place for the consumer.

## RPP Hours

### NW Center Check Pick-Up Hours

<b>Monday – Thursday</b>	<b>8:30 am to 4:30 pm</b>
<b>Fridays</b>	<b>8:30 am to 12 noon</b>

**Bread for the City** is closed on **DC Government Holidays** and follows the **Federal Government** in closing for inclement weather.

## RPP Staff

**RPP Program Main Line**      **202-386-7016**

### **RPP Coordinators**

Each of our RPP Coordinators has been assigned to cover particular partner agencies. Please call our main # 202-386-7016 if you are not sure which RPP Coordinator you should contact.

<b>RPP staff</b>	<b>Email Address</b>	<b>Phone</b>
<b>Johnnie Brooks</b>	<a href="mailto:jbrooks@breadforthecity.org">jbrooks@breadforthecity.org</a>	202-386-7021
<b>Dwaynae Jordan</b>	<a href="mailto:djordan@breadforthecity.org">djordan@breadforthecity.org</a>	202-301-1691
<b>Justin May</b>	<a href="mailto:jmay@breadforthecity.org">jmay@breadforthecity.org</a>	202-386-7615
<b>Kurtisa Pratt</b>	<a href="mailto:kpratt@breadforthecity.org">kpratt@breadforthecity.org</a>	202-480-8959

**RPP Benefits Supervisor: Lauren Taylor**    [ltaylor@breadforthecity.org](mailto:ltaylor@breadforthecity.org)      202-386-7619

**RPP Benefits Assistant: Kesara Brewster**    [kbrewster@breadforthecity.org](mailto:kbrewster@breadforthecity.org)      202-386-7089

**RPP Program Manager: Robyn Dudley**    [rdudley@breadforthecity.org](mailto:rdudley@breadforthecity.org)      202-386-7083

### **RPP Program FAX**

**202-265-1970**

This number sends all documents directly to into our electronic medical records system; for ease of processing, please include info for only **one consumer** per fax.

For information about all of Bread for the City's services, please also consult our website at [www.BreadForTheCity.org](http://www.BreadForTheCity.org).