

Money Management Program

Volunteer Representative Payee – Job Description

Summary

Representative payee volunteers provide direct service to low-income clients who are elderly or have a disability and have been designated by a federal agency (i.e., Social Security Administration) as incapable of handling their financial affairs. Clients are screened to determine their eligibility to participate in the program, and that they have neither family nor friends who are able or appropriate to help them. Meetings are held in the client's home at least monthly or as needed to keep finances in order. A special Representative Payee checking account is established for each client and used by the volunteer to pay the client's bills and expenses. Representative Payee service is provided to enable the client to provide as much independence as possible with minimum of intervention.

Duties and responsibilities of a volunteer representative payee

- Adheres to program policy and guidelines
- Completes and submits monthly activity reports to program staff.
- Performs representative payee tasks, e.g., paying client's bills, signing checks, and balancing the checkbook
- Visits the client at least monthly at a mutually convenient time to pay bills and to balance the client's checkbook.
- Uses the client's benefits only for the well being of the beneficiary, giving priority to essential needs.
- Notifies the program coordinator, in a timely way, of any problems with assignments or planned absences from the program.

Qualifications of a volunteer representative payee

- General knowledge of household budgeting and daily money management.
- Accuracy in maintaining financial records.
- Patience and tactfulness; ability to work cooperatively with a wide variety of individuals including people with significant physical and mental impairments and varying socioeconomic backgrounds; ability to persist when dealing with government or community agencies.
- Able to provide own transportation to meet with clients.

Commitment of a volunteer representative payee

- 2+ hours per month
- One-year renewable commitment.

Supports provided

- Initial orientation/training and periodic volunteer meetings
- On-going support from program staff
- Volunteer supplemental insurance
- AARP limited liability protection