

SAN MATEO COUNTY  
MENTAL HEALTH SERVICES DIVISION

DATE: December 18, 1992

MENTAL HEALTH POLICY NO.: MH 92-13

SUBJECT: Representative Payee Acceptance Criteria

AUTHORITY: Divisional

SUPERSEDES: Amended August 6, 1999 and November 15, 2001

POLICY

The following criteria must be evaluated and met before the Mental Health Services Division will agree to provide Representative Payee services:

I. Eligibility Requirements

1. Age 18 and over
2. A resident of San Mateo County
3. Is currently receiving services from a county-funded provider, or
4. Is in the process of being referred for services to a county-funded provider
5. At the time of referral, lives in the community or a community care facility (not a jail or state hospital)

II. Exclusionary Criteria

1. Clients open for service only through network fee-for-service providers
2. Clients referred for case management services solely for the purpose of establishing Representative Payee eligibility.
3. A request by Social Security or other agency to serve a client, based on history of substance abuse, is not sufficient justification, by itself, to establish client eligibility for Representative Payee services.

III. The need for money management services shall be demonstrated through documented examples of skill deficits that prevent successful self-management of funds.

1. Clients, who are competitively employed, own and maintain cars and/or own and maintain homes may not be candidates for Representative Payee services.
  2. Clients unable to manage money for their own food, clothing and shelter may be appropriate candidates for Representative Payee services.
- IV. The client is capable and willing to cooperate with Representative Payee services provided by county or contract agency staff. To establish and document that agreement, each client must:
1. Sign the “Representative Payee Agreement” requesting that Mental Health Services provide Representative Payee services in accordance with the service plan
  2. Sign the Representative Payee Consent Form, and
  3. Sign and cooperate with the initial and ongoing budget plans.
- V. All income and benefits must come from government sources such as Social Security, Railroad Pension, and Medi-Cal/Medicare.
- VI. The client agrees that the Representative Payee shall have an ongoing accounting of all cash assets such as savings or checking accounts that hold funds obtained from governmental source.
- VII. The client must be able to decide and arrange for maintenance and repairs to any real estate owned.
- VIII. The client must demonstrate retention of the legal capacity to manage financial affairs and consent to medical treatment, thereby indicating there is no need for conservatorship services.
- IX. Mental Health Services Division is the resource of last resort for clients who need money management services.. All other resources must be explored and exhausted first to determine there is no other individual or agency available to provide money management services.
- X. A client no longer needing mental health services, but who continues to need Representative Payee services, must be transferred to a more appropriate Representative Payee Resource.

Approved: \_\_\_\_\_  
 Gale Bataille, Director  
 Mental Health Services Division