



ALCOHOL, DRUG & MENTAL HEALTH SERVICES
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Alameda County Substitute Payee Program
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QIC 28005

Date: April 22, 2005

To: All Sub-Payee Case Managers and Contact Staff

Re: Reporting Responsibilities of Case Managers and Contact Staff

It has recently come to my attention that there has been some confusion regarding reporting responsibilities of Sub-Payee case managers and contact staff. Therefore, I would like to clarify and re-emphasize what information is required by the Social Security Administration, Social Services and the Alameda County Substitute Payee Program.

The Sub-Payee Program is mandated to report to Social Security and to Social Services all financial information, information regarding living arrangements, changes in employment, changes in marital status and any and all information that may have any bearing on the client's benefits.

As a participant of the Sub-Payee Program, you are **not** required to obtain permission from the client regarding release of any information to the Sub-Payee Program. **Do not** delay in informing the Sub-Payee PST of the required information pending you discussing the matter with the client or trying to obtain the client's permission. Clients participating in the Sub-Payee Program have signed a consent to release information as a condition of participation, and it is all the authorization we need. Delays in reporting the required information may have an adverse affect on your client's benefits. We will only release information to Social Security or to Social Services.

We are contracted with Social Security and have agreed to provide and verify all information required to determine the client's eligibility for benefits. Social Security requires that case managers and contact staff must have, at a minimum, direct monthly contact with the client, be aware all of the financial issues and needs of the client, and have knowledge of client's whereabouts at all times. Case managers and contact staff must provide us with all required information and verification immediately. If you have lost contact with the Sub-Payee client or the client refuses to contact you, you must notify us at once and all disbursements need to be stopped.

Failure to provide all information to the Sub-Payee Unit necessary to meet Social Security and/or Social Services requirements will affect your client's benefits (i.e. suspended or terminated benefits and overpayments). In addition, continued failure to adhere to program reporting requirements will impact your client's ability to remain as a participant in the Sub-Payee Program.

If you have any questions or concerns regarding your reporting responsibilities, please don't hesitate to contact me at (510) 383-1567 or tie line 31567



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