

# Western Montana Chapter

*Participant's Name:* \_\_\_\_\_

*Services Provided:* \_\_\_\_\_

*Bookkeeper:* \_\_\_\_\_

*Social Worker:* \_\_\_\_\_

*Date Entering Services:* \_\_\_\_\_

## Client Handbook

## **The Western Montana Chapter**

The Western Montana Chapter (WMC) is a private non profit organization dedicated to providing clients with professional services. We act as neutral, objective third party, focusing on the best interest of our clients through sustainable management of assets and comprehensive case management. We are a bonded and insured 501c3, non-profit, registered with the State of Montana. We have a Board of Directors composed of professionals in the community.

### **Services WMC Provides**

#### **Payee:**

The WMC acts as payee for persons deemed, by the Social Security Administration, to need those services. Typically, such persons include those receiving Social Security, Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI); and/or individuals designated to receive benefits from the Veteran's Administration and Railroad Retirement.

As a representative payee, we must keep Social Security informed of the individual's needs so that we can appropriately determine how benefits can best be used for his or her personal care and well-being. Representative payees are required by law to use benefits properly. If a payee misuses benefits, he or she must repay the misused funds to the beneficiary. Funds received are to be used for the beneficiary's day-to-day needs for food and shelter. Remaining funds are then used for the beneficiary's personal needs, such as clothing, recreation and other expenses.

The determination of need and the appointment of a payee is the role of the Social Security Administration. The removal or change of payeeship is solely at the discretion of the Social Security Administration.

#### **Conservator:**

The WMC may act as a court appointed conservator and guardian in regards to individuals found to lack the ability to handle their own affairs. We follow all the rules set up by the court including an initial inventory, annual accounting reports and day to day management of the client's resources. Reports are provided upon request to approved individuals. The reports will show all transactions related to the account.

#### **Trustee:**

The WMC acts as trustee in regards to regular and special needs trusts (where SSI and Medicaid are protected) established to help maintain funds for an individual. We follow

the direction of the specific trust, disbursing funds as indicated in the trust document. We communicate with the trust protector if one is established.

### **Guardian:**

In special circumstances, we will take on the role of co-guardian with another individual. Most often this takes place when the co-guardian lives at some distance.

### **Case Management:**

The WMC's staff of social workers provides case management services to clientele. We provide both a service customized to meet the individual's financial needs along with assistance in: getting to appointments; looking for housing; and gathering information about programs in their area and getting them connected to those programs.

### **How You Contact Us**

We are open 8-5 Monday through Friday. The office phone number is 327-7886 and our mailing address is PO Box 17800, Missoula, MT 59808.

Phone Messages: Everyone in the office has voicemail, so if they are unavailable when you call you can leave a message. The staff will attempt to return your phone call within 24 hours. If you leave a message on a Friday or over the weekend your call will be returned once staff is back in the office.

Setting up Appointments: If you would like to meet with a staff member appointments will need to be scheduled in advance.

Requests for Reports: Registers of any accounts are available to approved individuals within 48 hours.

Requests for Money: Budgets will be set up by the bookkeeper based on income and expenses. If an unexpected expense arises and you make a request for additional funds you need to give us 24hrs notice. In that 24hr time period the bookkeeper will determine if there are enough funds available based on the budget that has been previously set up by the bookkeeper.

**\*\*\*If at anytime you become aggressive or use inappropriate language with the WMC staff you will no longer be allowed to call or come to our office for an undetermined amount of time. All contact will then be directed through a case manager or guardian.**

### **WMC Fees**

The WMC is a fee based non-profit organization. Those fees may be set by the source of funds like Social Security, Veterans Administration, Railroad Retirement and court

appointed roles (conservator, guardian, and trustee). Our own Chapter fees are established each year and approved by our Board of Directors.

Our clients are billed monthly and sometimes there are not enough funds to pay our fee, so the amount is left on the books until there are future funds. If there are no funds to pay our fee after a certain period of time the amount owed is either paid by a grant or written off.

### **How many people does WMC Serve?**

The Western Montana Chapter serves roughly 200 individuals.

### **Our Staff:**

Our staff includes several account managers who work full and ½ time. They have a combined experience of 44 years in the management of finances. The WMC has social workers available to provide case management when needed. There is also a Director, administrative assistant and in house counsel.

### **Personal Rights and Responsibilities:**

You should expect to be treated fairly and understand that you have the same rights as any other citizen. With all your rights come responsibilities. It is your responsibility to treat others with the respect you like from other people.

- You have the right to be treated nicely and with respect all the time. You need to treat others nicely and with respect too.
- You have the right to have the information in your file kept private. You have the right to see information in your file.
- You have the right to ask someone – your case manager or an appropriate family member to speak with you.

### **Grievance Procedure:**

If you have any questions, problems, or complaints, you should talk with your bookkeeper. If you can not work things out the complaint should be put in writing and submitted directly to Melissa Stiegler, Executive Director. The written complaint can be mailed to Kevin at PO Box 17800, Missoula, MT 59808 or it can be emailed to him at [melissa@westernmontanachapter.org](mailto:melissa@westernmontanachapter.org). All such matters are confidential.

Complaints made against the Executive Director need to be filed with the WMC Board of Director's Executive Committee (President, Vice President, Secretary or Treasurer). A member of the Executive Committee will be present in any meeting regarding a conflict/complaint involving the Executive Director that has been filed with the committee.

### **Non-Discrimination**

The Western Montana Chapter does not discriminate because of race, color, religion, sex, national origin, sexual orientation, gender, or disability. Services are provided to any person who is elderly or has a disability and meets the criteria for services.

### **Records and Reports**

A file will be kept in our office which contains the pertinent information that was filled out on our referral form, social work notes, copies of bills, bank statements, court documents, any documents from the Social Security Administration, Veterans Administration, Railroad and any other financial documents. The current year is kept in the office and previous years are kept in our storage unit. All records are confidential.

The WMC follows the rules established by either the source of the funds, the court or the terms of a Trust document. We complete and file reports annually that are required by the funding sources (Social Security, Veterans Administration, District Court, and Trust Document).

### **Conflicts of Interest**

The WMC has recognized that we may have a conflict of interest when it comes to collecting fees for the services we provide. We feel it is important for you to be aware of this. When we bill for the service we provide you, a bill is generated and then we pay our bill out of your account. As stated above in the "Fee" section the Social Security Administration, Veterans Administration, Railroad Retirement and state law give us authorization to charge a fee for services provided.

### **How You Would Leave Our Services**

The WMC has the right to terminate the service we provide you at any time. We will contact the funding source letting them know we no longer want to handle those funds.

If you wish to terminate the service you would need to go through the appropriate channels (contacting Social Security, Veterans Administration or an attorney in the case of conservatorship or Trust).

If, after leaving, you decide to return to services, you will need to go through our referral process again.