



Financial Transaction Record

As per policy, Care for People Plus (CFP+) and the Contracted Support Staff (CSS) may never serve as the representative payee for any consumers we support. We do understand there are times that in order to assist consumers in achieving their outcomes it is necessary for CSS to handle funds on their behalf. The following is a record documenting such a transaction:

Consumer Name _____ CSS Name _____

CSS received funds from _____ on _____
Name of Consumer's Representative Date

For the purpose of _____
Indicate the reason CSS had funds

Amount Received: \$ _____

Purchases made \$ _____ Representative Initial for receipt _____

\$ _____ Representative Initial for receipt _____

\$ _____ Representative Initial for receipt _____

\$ _____ Representative Initial for receipt _____

\$ _____ Representative Initial for receipt _____

\$ _____ Representative Initial for receipt _____

\$ _____ Representative Initial for receipt _____

\$ _____ Representative Initial for receipt _____

Amount Returned \$ _____ Representative Initial for receipt _____

Signature of Representative

Date Completed

Signature of CSS

Date Completed