



Personal Allowance Manager

Cloud-based solutions focusing on the management and regulatory compliance of consumer fund accounts **for the Representative Payee**

Does your consumer fund accounting solution manage both your regulatory and accounting requirements?

Paradigm Technology Consulting (PTC) is pleased to announce the launch of **Personal Allowance Manager (PAM)**. PAM is a cloud-based subscription service that fulfills your organization's needs when it comes to both regulatory and accounting requirements.

PAM focuses on monitoring personal expenditure planning (PEP), money

management assessment (MMA) and accounting for personal allowances. By improving controls in these key areas, PAM aids in satisfying regulatory requirements. You will always be audit ready.

Featuring minimal upfront investment in both software and hardware, PAM offers your facility a solution that is budget friendly.

WHY USE?

- Minimal upfront investment
- Rapid implementation
- Flexible and scalable solution
- Assists with regulatory compliance
- Cost-effective monthly subscription fees based on the number of named users
- Focuses both on accounting and regulatory compliance
- Representative Payee income calculations
- Increases efficiency in tracking resident account balances
- Alerts for monitoring resident balances
- Perform internal audits per regulatory requirements

HOW MUCH DOES IT COST AND HOW DO I GET STARTED?

Pricing is simple and subscription-based. That means you pay monthly for the number of users that access the cloud-based solution. Hosting, support and software updates are included in the monthly fee.

Contact Paradigm Technology Consulting to discuss your unique needs and see if Personal Allowance Manager by PTC is the right solution for your facility. There is no obligation when you speak to one of our solution professionals.

FEATURES & BENEFITS

- Setup unlimited funds per resident and define fund types.
- Manage sub ledger balances by resident within each account – deposits, withdrawals, interest, and transfer between accounts.
- Document and maintain personal expenditure plans per resident – create, monitor, audit.
- Document and maintain money management assessment per resident.
- PAM includes templates for SSA prior approval requests, which can be maintained per resident.
- Define regulatory allowances and limitations by residence type and state.
- PAM includes computerized ledger cards for monitoring account balance by resident balance within each cash account.
- Attach scanned receipts and files for audit compliance.
- Define user expense types indicating whether they qualify for personal allowance inclusion.
- Define income type as needed for flexibility.
- Calculate earned income exclusions.
- Calculate personal allowances by resident and manage balances.
- Trigger alerts to warn on balance limitations per regulatory compliance.
- Trigger alerts for mandatory plan review dates.
- PAM enables Representative Payee tracking and accounting, including calculation of revenue earned by facility.
- Perform random sample selection for internal audits.
- Link to QuickBooks check writing & bank reconciliation (coming soon).



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