

Strengthening Protections for Social Security Beneficiaries

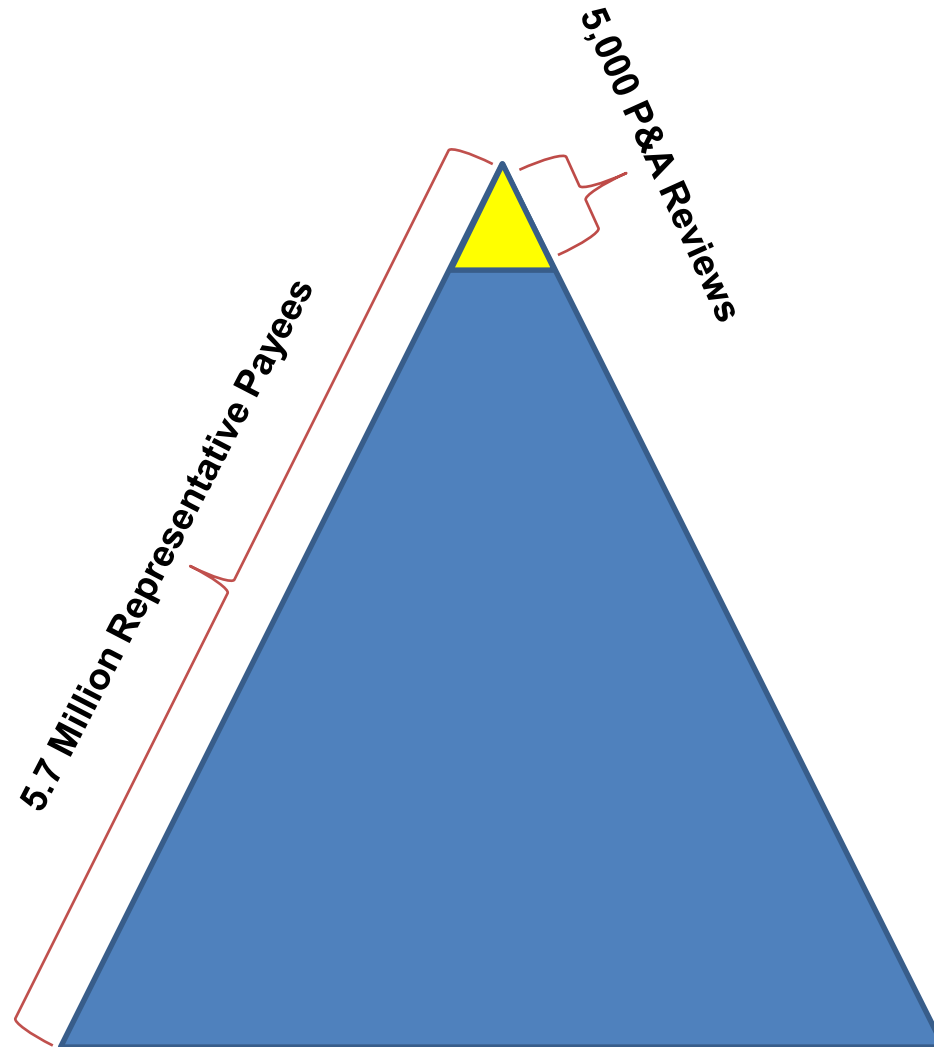
HR 4547

Representative Payees

Approximately **5.7 million** payees managing **\$70 billion** in annual benefits for **8 million** beneficiaries.

- Mental Hospitals (public and private)
- Nursing Homes / Assisted Living Facilities
- Fee-for Service Payees
- Social Service Organizations
- Individual Payees
- Family Members

Representative Payees



History

- Statutory Requirements
- Individual Payees
- Henry's Turkey Service Scandal
- Discretionary Review Program

ISN Corporation

A Contractor on Behalf of SSA

- **LITTLE** Disability Experience
- **VERY FEW** Cleared Staff
- **LACKING** Experienced Staff

Failure to Perform

HR 4547

- House Ways and Means Committee Held 2 Hearings
- Passed House 396 – 0
- Passes Senate By Unanimous Consent
- Signed by President April 13, 2018

Statute

- Formula Grant to All 57 P&A Agencies Based on Number of Beneficiaries in the State/Territory
- \$25 Million Annual Allotment
- \$60,000 Minimum State | \$30,000 Territory
- Start-up August 1, 2018
- Expenditures for Start up as of May 1, 2018

Other Provisions

- End Individual Accounting Forms (saving \$70-\$90 million annually)
- Research Projects
- Net Saving to SSA \$25-\$30 Million

National Assistance Grantee (NAG)

- 4% of Allotment = \$1 Million
- Sole Source to NDRN
- Begins June 1, 2018

NDRN Scope of Work

- Provide Training
- Deliver Administrative Oversight
- Training and Technical Assistance
- Other Support for Reviews and Educational Visits

P&A Scope of Work

- Individual Payees Serving 14 or Fewer Beneficiaries
- Individual Payees Serving 15 or More Beneficiaries
- Organizational Payees Serving 49 or Fewer Beneficiaries
- Organizational Payees Serving 50 or More Beneficiaries

P&A Scope of Work

- Fee-for-Service Organization Serving 5 to 49 Beneficiaries
- Fee-for-Service Organizational Payees Serving 50 or More Beneficiaries
- Onsite State Mental Institutions
- Quick Response Check – Misuse Not Alleged
- Quick Response Check – Misuse Alleged

P&A Scope of Work

- Educational Visits
- P&A Initiated Reviews
- Plan of Correction

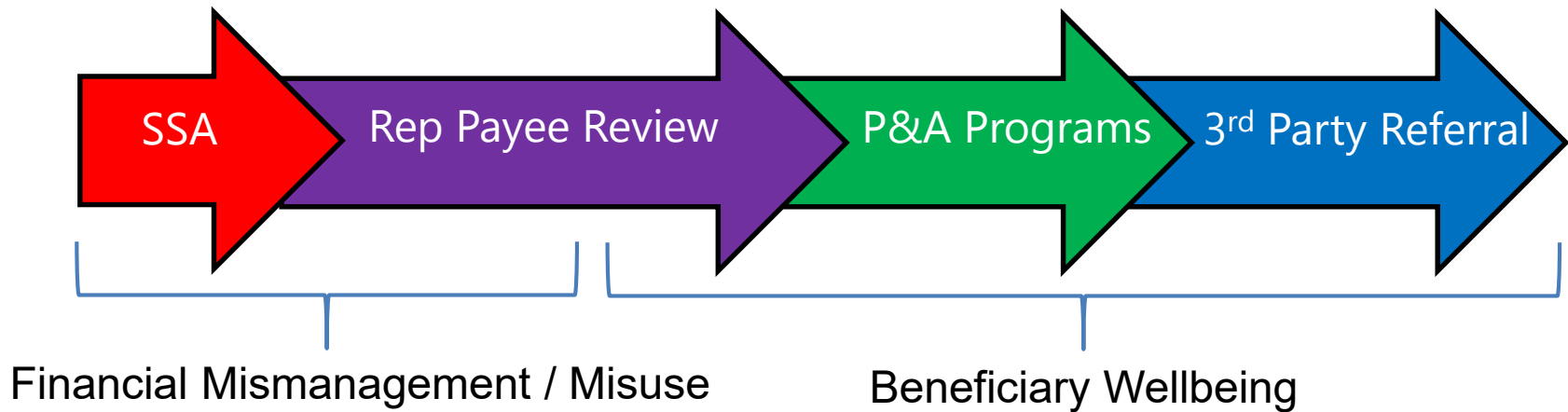
P&A Initiated (wild card)



How to Refer a Beneficiary or Report a Rep Payee

- Who can report problems with a Rep Payee? Anyone
- <https://youtu.be/Gg4GmEEbuz0>
- P & As can conduct “Educational Visits” to determine whether a full review is needed

Corrective Action Plans



Let us know how it's going

- Who have you told about the Rep Payee legislation?
- Which materials have you disseminated?
- What activities have you conducted to disseminate information about Representative Payee Reviews?

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