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

5.7 Million Representative Payees

5,000 P&A Reviews
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 Preform
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)

- Long-Term Care (LTC) Ombudsman
- Centers for Independent Living (CILs)
- Disability Advocates
- Social Service Agencies
- Legal Service Organizations
- Legal Guardians
- Family Members
- Disability Service Providers
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

SSA → Rep Payee Review → P&A Programs → 3rd Party Referral

Financial Mismanagement / Misuse
Beneficiary Wellbeing
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?