

REPRESENTATIVE PAYEE

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Rep Payee

Social Security Term

SSI

SSDI

SS Retirement

Why be a rep payee?

Housing

Pay rent & utilities – mandatory

Balance? – individual's choice

How do you become a Rep Payee?

- Form SSA-11
- Why does this person need a Rep Payee?
- Why do you think you'd be a good choice as their Rep Payee?
- How often will you see them?
- Do they owe you any money?
- Where do they live? Do you expect that to change?
- Institution vs. individual sections
- Sign
- Send person to SSA with form

Social Security Administration

- 2 ways to allow a rep payee
 - Physician or clinician (form SSA-787)
 - preferred
 - Lay determination – in SSA office
- Easier to get rep payee approved than to terminate the rep payee program

Social Security Administration

- Sometimes they send a letter to the beneficiary – 15 day turn around
- Once approved – letter usually arrives to name you as the payee and to tell you their monthly benefit
- 1st check is usually by U.S. Mail

Bank Account

- We set up accounts for every person, in their name
- Requires their name, social security number and DOB
- Once we have the account, we notify SSA of the account number and routing number
- Money is direct deposited on the 1st or 3rd of every month

Bank Account

- On-line banking
- Person may cash checks written to them but the actual accounts belong to the agency, not the beneficiary
- No deposits; no checking balances; no authorizing on-line transactions

Monthly Activities

- Prepare for monthly payments – rent & utilities are mandatory, other bills optional (cable, phone, etc.)
- Check accounts on-line on the 1st and 3rd of every month
- Write checks or withdrawal slips as needed for personal spending
- Recording of all transactions in Quickbooks

Monthly Activities

- Bank reconciliation with Quickbooks
- Cash & checks to people who spread out their personal spending
- Updating rents & utilities as needed

Reporting

- Notification of SSA when beneficiary's status changes – skilled nursing facility, corrections, long-term treatment programs
- Annual reporting to SSA – housing, food & clothing; other expenses; savings

Contact Info

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