



Federally Mandated Protection & Advocacy System For People with Disabilities in Illinois



REPRESENTATIVE PAYEE PROGRAM

Strengthening Protections for Social Security Beneficiaries Act of 2018

On April 13, 2018, the President signed the Strengthening Protections for Social Security Beneficiaries Act. This Act provides many new protections for Beneficiaries of the Social Security Administration's (SSA) Representative Payee Program and improves oversight of Payee management of benefits. The Act also lessens the burden on families.

The Act directs the Protection and Advocacy (P&A) system in each state to conduct performance reviews of Representative Payees to determine if Beneficiary funds are properly safeguarded and their needs met, along with additional discretionary reviews. The Act also directs P&As to conduct outreach and educational trainings to ensure that Payees understand their duties and responsibilities. Equip for Equality is Illinois' P&A system.

The Act Will Help To:

- Improve oversight of Representative Payee management of Beneficiary money;
- Prevent Representative Payees who are prohibited from being a Payee because of a criminal background or other Social Security policy from being appointed;
- Keep Beneficiaries safe and ensure their needs are met;
- Allow Beneficiaries to suggest who they would like to be their Payee in the future should the need for that kind of support arise and SSA will consider that suggestion;
- Lessen the burden on families who are Representative Payees for their minor children, adult children with disabilities or their spouse living in the same household by ending the requirement to file an annual accounting with SSA.

Representative Payee Performance Reviews Include:

- An interview with the Representative Payee, both individual and organizational Payees;
- A review of the Representative Payee's financial records for a sample of Beneficiaries served;
- Interviews of each Beneficiary included in the review and visits to their homes, work place or other settings where the Beneficiaries engage in activities during the day;
- Interviews with guardians and, where necessary, other third parties.

Review of Financial Records Will Include:

- Budgets;
- Ledgers;
- Bank statements;
- Collective bank account statements;
- Bills;
- Bank reconciliation records;
- Receipts;
- Cancelled checks;
- Rental agreements

Outcome of the Review:

If Equip for Equality's review finds that the Representative Payee is not carrying out its duties, corrective action(s) may be needed for the Payee to continue to manage the Beneficiary's money. Once all corrective actions are implemented, or if the review finds that no corrective action is needed, the Payee will be notified that the review is complete. ■



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1-800-772-1213 (Voice)
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