



We have the legal right of way.

REPRESENTATIVE PAYEE REVIEW PROGRAM

This program started on August 1, 2018, after HR 4547 Strengthening Oversight and Beneficiary Protections passed through Congress and was signed into effect by the President. With this law, the Protection and Advocacy Agencies across the country, like Disability Rights Ohio, will start performing regular reviews of the Representative Payees within the Social Security Administrations system.

A representative payee can be a person or an organization. They are appointed as a payee for beneficiaries who cannot manage or direct the management of his or her Social Security benefits. A payee's main duties are to use the benefits to pay for the current and future needs of the beneficiary and properly save any benefits not needed to meet current needs. A representative payee must also keep records of expenses.

Through this program we will:

- **Help representative payees** understand their obligations to the beneficiary being served.
- **Review the financial records** the representative payees use to keep track of the beneficiaries Social Security benefits to ensure no concerns are present.
- **Speak with the representative payee and beneficiary** about the payeeship, in order to discuss any issue either or both may have.
- **Make outside referrals** to either or both the representative payee and the beneficiary in concern with other issues or needs that may come about through the review.
- **Ensure any issues found are addressed** through the appropriate agencies.

This document is funded through a Social Security cooperative agreement. Although Social Security reviewed this document for accuracy, it does not constitute an official Social Security communication.