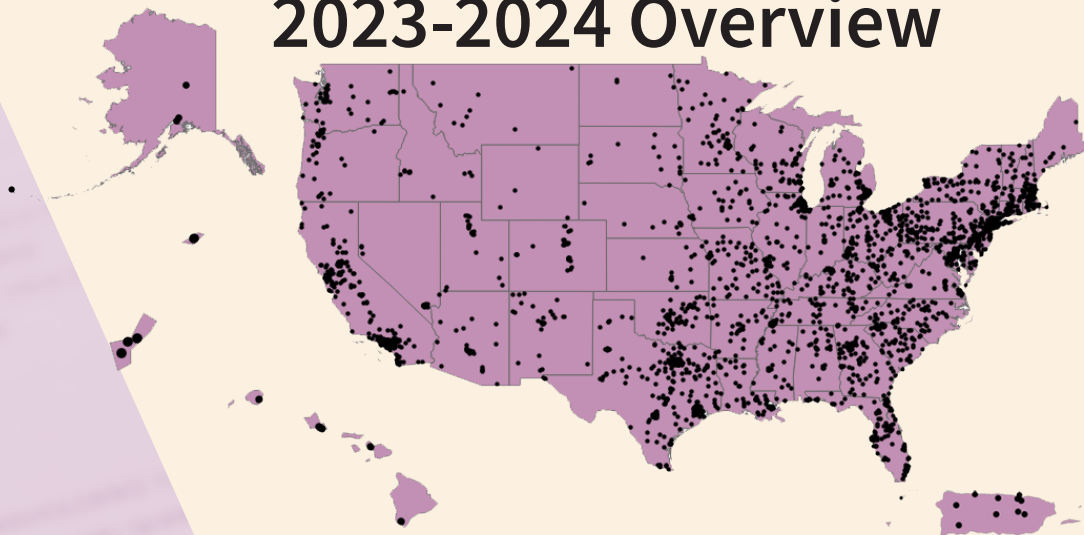


Representative Payee Review Program

2023-2024 Overview



Map of Payee Interviews

Program Outcomes



3,745

Payee Interviews



18,680

Beneficiary+
Interviews



2,018

Referrals Made



222,862

Beneficiaries
Impacted

What's New?

The Protection and Advocacy (P&As) network began their sixth year of monitoring representative payees in 2023. At the start of the program year, P&As returned to conducting in-person interviews with an updated business process. The P&As conducted **3,745** payee interviews and **18,680** interviews with beneficiaries, legal guardians, and third parties. Based on their findings, P&A reviewers provided **2,018** referrals to connect payees and beneficiaries to additional resources. The payees who participated in reviews served **222,862** total beneficiaries, reflecting a total number of **beneficiaries impacted**.

This document is funded through a Social Security grant agreement and was created at taxpayer expense. Although SSA reviewed this document for accuracy, it does not constitute an official SSA communication. This analysis is based on data compiled from the Representative Payee Monitoring Tool (RPMT) data and ongoing qualitative feedback from the P&A Network. The information and opinions expressed here are solely those of NDRN and are not those of SSA. SSA has the final determination or decision on all P&A findings.

P&A Reviewers make referrals to ensure protections for beneficiaries and to enhance their quality of life.

17.5% were **Red Flag Referrals**

P&As made **353** Red Flag referrals regarding high priority concerns, such as public health concerns, or indications of abuse or neglect of a beneficiary.

82.5% were **Non-Urgent Referrals**

The remaining **1,665** referrals were made to connect beneficiaries to additional resources within their community, such as self-advocacy resources, assistive technology, and other services within their state.



Where were referrals most frequently made?



Red Flag Referrals

149 State/County Oversight Referrals, such as the Dept of Health

99 P&A Monitoring Teams Referrals for additional monitoring of concerning situations

56 Adult/Child Protective Services Referrals

4 Emergency Services Referrals



Non-Urgent Referrals

461 Self-Advocacy Services Referrals, such as information about rights and other community resources

383 ABLE Accounts Referrals to address questions about conserving benefits

145 Employment and Education Referrals

137 Housing Resource Referrals

Connecting Beneficiaries to Community Resources

During the review of a large social services provider, a P&A reviewer learned that the payee did not maintain regular contact with beneficiaries, resulting in service gaps. They identified and shared local resources so beneficiaries could address their immediate needs.

- **Utilities** - The P&A reviewer made referrals to local agencies to address expensive utility bills and poor heating in the winter.
- **Housing** - Beneficiaries were dissatisfied with their homes, citing public health concerns and high energy usage, resulting in expensive bills. Referrals were made to the P&A's housing teams to address their concerns.
- **Food** - Referrals were made to local food assistance programs to address food insecurity.
- **Vision Care** - Beneficiaries were referred to county social services to access medical vision care and obtain corrective lenses and other vision-related resources.
- **Employment** - The P&A reviewer shared information about how Social Security beneficiaries can also seek employment and provided referrals to Ticket to Work and Vocational Rehabilitation.

For more information about the Representative Payee Review Program, please contact Zach Martin at Zachary.Martin@ndrn.org.