



Disability Law Colorado (DLC) was appointed as Colorado's Protection & Advocacy Agency in 1977. We obtained the Representative Payee program in 2018 as part of the Strengthening Protections for Social Security Beneficiaries Act of 2018. This law directs state-designated Protection & Advocacy (P&A) Systems to conduct all periodic on-site reviews of Representative Payees and investigate allegations of payee misconduct. In addition, the P&A's conduct educational visits for new representative payees.

### Overview:

A representative payee is a person or an organization appointed by the Social Security Administration to receive the Social Security or SSI benefits for beneficiaries who cannot manage or direct the management of their benefits.

Types of Social Security Benefits include: (1) Personal retirement or survivor benefits for spouses or children, (2) Supplemental Security Income (SSI), and (3) Social Security Disability Income (SSDI).

### Responsibilities:

A representative 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 that are not needed to meet current needs.

A representative payee must also keep records of expenses. When the SSA requests a report, a representative payee must provide an accounting of how they used or conserved the benefits.

### Process:

- DLC calls the representative payee to schedule the review.
- DLC interviews the representative payee and reviews financial records.
- DLC interviews the selected beneficiaries and their legal guardians or third parties.

### Impact:

- DLC has the resources to conduct reviews in a timely, comprehensive manner.
- DLC can form or strengthen relationships with community members and agencies.
- DLC can refer beneficiaries and agencies/providers to resources if a need is identified.
- Beneficiaries can take an active role in the review process and have an opportunity to report misuse or neglect.

### Additional Resources:

The SSA website: <https://www.ssa.gov/payee/>

The SSA Representative Payee Site Reviews page: [https://www.ssa.gov/payee/reviews\\_by\\_Protection\\_and\\_Advocacy.htm](https://www.ssa.gov/payee/reviews_by_Protection_and_Advocacy.htm)

DLC's Representative Payee page: <https://disabilitylawco.org/issues/representative-payee>