

Social Security Representative Payee Responsibilities

Policy & Procedure SGHC101691

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Purpose

Delineation of the responsibilities of hospital personnel in carrying out the obligations of the Department of Health as Representative Payee for a patient's Social Security benefits.

Definitions

Representative Payee: A person or entity approved by the Social Security Administration to receive and use benefits on the behalf of an individual.

Social Security Benefits: Social Security Disability Insurance (SSDI) pays monthly benefits to workers who are no longer able to work due to a significant illness or impairment that is expected to last at least a year or to result in death within a year. This benefit is part of the Social Security program that also pays retirement benefits to the vast majority of older Americans. Benefits are based on the disabled worker's past earnings and are paid to the disabled worker and to his or her dependent family members. To be eligible, a disabled worker must have worked in jobs covered by Social Security.

Supplemental Security Income: Supplemental Security Income (SSI) is a federal program that pays monthly benefits to low-income aged, blind, and disabled individuals. The Social Security Administration runs the program, which is financed from general tax revenues, not from Social Security taxes. The SSI test of disability for adult applicants is the same as the test in the Social Security disability insurance program. Only people who have low incomes and limited financial assets are eligible for SSI.

Policy

Hospital staff will be made aware of the identity of those patients for whom the Department of Health is Representative Payee. The Financial Agent's Office (FAO) maintains this list and manages these funds in accordance with all applicable COMAR regulations.

Procedure

- A. The Financial Agents Office (FAO), after the completion of a financial evaluation, notifies the Social Security Administration (SSA) of involuntary

court ordered confinement to suspend active Title II and Title XVI benefits to prevent over payments.

- B. If an overpayment has occurred and discovered by the FAO, the FAO will contact SSA. The FAO applies to become Representative Payee when the patient is incapable of managing their benefits or if their current Representative Payee is not fulfilling their obligations.
- C. FAO notifies SSA of legal class changes, discharges or if the patient dies while hospitalized at SGHC.
- D. The FAO will only apply for Rep. Payee for SSDI benefits, not SSI. The patient's Personal Needs Allowance (PNA) is deposited into their hospital bank account. The FAO notifies the Social Work Department when the patient's hospital bank account accrues a balance of over \$2500. The FAO will allow additional expenses upon request.
- E. Expenditures for each patient must be determined on an individual basis. Expensive or unusual items should be the result of a team decision. All therapeutic purchases have written recommendation of a doctor or appropriate physical, speech, occupational therapist, or the Therapy Services Coordinator. SGHC Staff must obtain receipts for expenditures and file in patient's chart.
- F. In the case of smaller expenditures, when the patient is legally able to go off grounds, the Psychiatrist may choose to make a written order for a Therapeutic Activity, as well as notify the Director of Rehab via email. The Director of Rehab will assign a staff to accompany the patient to the store as a Community Reintegration Activity. If the patient is not legally able to go off grounds, the Treatment Team must document that an expenditure is appropriate. In the case where there is no family or friend to assist the patient to purchase the needed items, the social worker, in consultation with the treatment team, will assign a member of the team to assist with making the purchase on the patient's behalf, in accordance with the current Patient Finance Policy. All receipts must be retained in the patient record.

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