

Representative Payee Focus Group Discussion Guide

I. Introduction/Ground Rules

Thank you for participating in our representative payee focus group. SSA needs representative payees to assist the most vulnerable members of society – the young, the elderly, and the disabled who are unable to manage their own Social Security and/or Supplemental Security Income (SSI) benefits. We know that becoming a representative payee can be a very rewarding experience but also very demanding. Through our discussions today, we would like to assess your needs as a representative payee and identify what SSA can do to help support you in this role.

Read Paperwork Reduction Act Statement:

Paperwork Reduction Act Statement – This focus group, cleared under OMB No. 0960-0526, meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995.

Participation in this focus group is voluntary. We estimate that it will take 2 hours to complete the focus group. Send **only** comments on our time estimate to: SSA, 6401 Security Blvd., Baltimore, MD 21235-6401.

II. Discussion Guide Questions

A. Experience Applying to be a Representative Payee

1. How did you come to be a rep payee?
2. Before you applied, what did you know about the duties and requirements for serving as a rep payee? Probe:
 - What did you know?
 - How did you learn about these duties and requirements?
3. Describe the process you went through to become a rep payee. Probe:
 - Did you have an interview with a Social Security employee?

- What was that experience like?
- Did the SSA employee explain your duties and responsibilities?
- Was the SSA employee able to answer all of your questions? Please explain.
- What sort of problems did you encounter in the process (for example, not having proof of identity in your possession)?
- Did you have any difficulty with any of the forms? Explain.

B. Representative Payee Duties/Responsibilities

- Please list your responsibilities and duties as a rep payee. *If they don't mention any duties and responsibilities, probe to find out if they are aware of specific duties such as paying for necessities for the beneficiary, reporting changes, etc.*

Accounting Process

1. What did SSA tell you about keeping records of monies you received and spent on behalf of your beneficiary(ies)? Probe:
 - Kind of records?
 - How long to keep them?
2. When you applied to be a payee, did SSA tell you that you must complete an accounting form once a year? *Show the form*
3. How do you complete your accounting report? (Take a count.) For example:
 - Paper form
 - Online
4. If you use paper:
 - Why do you prefer this method?
 - Any problems? Please explain.
 - Were you aware that you can use the Internet to submit your accounting report?
 - If no, why not?
 - If yes, why haven't you used it?
5. For those who completed the accounting form online:
 - Why do you prefer this method?

- How easy or difficult?
- Have you encountered any problems? Please explain.
- When you are asked to enter an SSN, is it clear which SSN you should enter, yours or the beneficiary's?

ORGANIZATIONS ONLY – When you registered to get your PIN and password to do the on-line accounting, were you successful?

- What kinds of problems did you run into with the registration process?

C. Reporting Changes

1. What events/changes do you need to report to SSA?
2. How do you usually report these events/changes? Specify.
 - In person
 - Online
 - Phone

SSA's 800 Number

1. Who uses SSA's 800#? (Take count)
2. What types of issues or questions do you call about?
3. What beneficiary changes (such as change of address or wages) due you usually report by phone?
4. How satisfied are you with the 800# service provided to rep payees?

Field Office Phone Service

1. Who speaks directly with the servicing field office? (Take count).
Probe:
 - Why did you choose that method?
 - Are most of your questions answered by the field office?
 - Do you speak to a specific person at the field office?

2. How satisfied are you with the field office phone service?
3. Are there other ways that you would like to communicate with SSA? What ways?

D. Web Site Usage

1. With what frequency would you say you use the Internet for work or personal business?
2. Before coming here today, how many of you were aware of either Social Security's main website...or SSA's rep payee website? (Take a count)
3. Of those of you who were aware of these two websites:
 - How did you become aware of them?
 - How often do you use the [socialsecurity.gov](https://www.socialsecurity.gov) or the [socialsecurity.gov/payee](https://www.socialsecurity.gov/payee) websites?
4. If you do not use either website, what are the reasons?
Probe:
 - Don't have access to the internet
 - Prefer to discuss in person or on the telephone
 - Questions are answered in our printed material
 - Tried, but it's not easy to use. Explain.
5. What can SSA do to make the rep payee website more useful for rep payees who represent more than one beneficiary? *provide a screen shot of the website*
6. What can SSA do to make more people aware of our rep payee website?

E. Printed Materials and SSA Support to Rep Payees

1. Do you use SSA's printed materials?
 - Are you aware that our publications are available online?
2. Have you read our representative payee brochures? *show a copy of each*

- A Guide for Representative Payees
 - Guide for Organizational Representative Payees 2008
 - When a Representative Payee Manages Your Money
3. If yes, is the content in the brochures clear? Probe:
- Is there anything missing that you would like to see?
 - How can we make them more useful to you?

F. Challenges and Support

1. What are your biggest challenges in serving as a payee?
Probe:
- Recordkeeping
 - Accounting
 - Reporting Changes
 - Interacting with the beneficiaries
 - Remembering all of your responsibilities
 - Reaching SSA to report changes or ask questions
2. What can SSA do to help you with these challenges?
3. What can SSA do for you that would help make your job as a representative payee easier?
4. What can SSA do to encourage more individuals or organizations to become rep payees?