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VOD Title: Rep Payee Elder Abuse Technical Training					
Delivery:		Articulate:	One Window Three Window		
IVT for VOD VOD Only VOD	for IVT	Microsoft Producer:	One Window Three Window		
IVT Air Date: Enter Date	VOD Date: Enter Date	EWD Date (VOD Techs	Only): Enter Date		
Producer(s): Ana/Charmaine					
Client(s):					
SME(s):					
Talent:					
Location in VOD Library (Section an	d Subsection, if applicable):				
Note:					
Note: For VOD: Submit the final script, graphics, and this cover sheet to the VOD Techs no later than 24 hours before taping begins. For IVT: Take the script or flash drive to the studio, along with printed copies for the IVT technician.					

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
		(G1-Title Slide)	Ana-
		(CG) Ana Obrebski and Charmaine Gibson Social Security Administration	Hi and welcome to this Representative Payee Technical Training. I'm Ana Obrebski, a Human Resources Specialist at the Social Security Administration or SSA.
			Today I'll be talking with Charmaine Gibson who is also a Human Resources Specialist at SSA.
			Hi Charmaine, thank you for joining me today.
			Charmaine – Hi Ana. Thanks for having me.
			Ana- Charmaine and I will be taking you on a nice train ride where you'll learn EVERYTHING there is to know about becoming a rep payee.
			We'll concentrate on individual rep payees for the elderly and vulnerable adults. We have additional training for organizational payees and payees for children.
		(G2- Destinations)	Our destinations are:
		(p) The programs	The programs administered by SSA
		(p) Who Needs…	Who Needs a Rep Payee?
		(p) Duties	Duties and Responsibilities of rep payees AND

Page: 2	
Script	
How to use the benefits	
Charmaine-	
That's right! We'll make sure you understand the information	

That's right! We'll make sure you understand the information
we're providing by having "knowledge checkpoints" stops
throughout the training.

Professor Ollie will ask you some questions, and once you			
answer them we'll be able to move on to the next train			
station.			

So sit comfortably and get ready!

Ana: (To Charmaine) Now are you ready?

Charmaine- Oh yes I'm ready

NEW TRANSITION We're going to start by sending things over to Felecia Lane SINGLE SHOT and Chad Bennett to talk to you about the programs we administer here at SSA.

Take it away! **FULL SHOT OF FELECIA** Felecia

Chad

Thank you Charmaine.

Hi I'm Felecia Lane

Sample Cue Legend: (G) = Graphic | (P) = Pop | (CG) Lower 3rd – Name/Info | (N/A) No Image | (VO) Voice Over

Bookmark Title

Small Window

Cues*

RETAPE

RETAPE

Large Window Cues**

Bring Prof O on the screen

(p) How to...

& CHAD

(CG) Felecia Lane and Chad Bennett Social

Security Administration

* Three-Window Model Only | **Three-Window Model – Slides Only; One-Window Model – Slides and Presenter

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			And I'm Chad Bennett.
			I will be discussing the Retirement, Survivors and Disability Insurance or RSDI Program.
			Felecia
			And I will be discussing the other program, Supplemental
			Security Income or SSI, which provides income for aged, blind and disabled persons. This one is a NEEDS BASED
			PROGRAM.
	RETAPE		CHAD
		(G3- Programs Administered by SSA) (p)The RSDI program	The RSDI program is the larger of the two major benefit programs. Most people refer to it as the Social Security program. It provides income for qualified workers who retire or become disabled and to their dependents or survivors.
		(p) Earned	It is an EARNED benefit.
		(p) we pay Social	We pay Social Security benefits under Title II of the
			Social Security Act. These payments are financed through payroll taxes from employees, employers, and
			the self-employed. This tax is referred to as FICA.
			As you work and pay Social Security taxes, you earn

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			"credits" that count toward eligibility for future Social Security benefits.
		(p) to be eligible	To be eligible to receive these benefits on YOUR OWN record, you must be at least 62 years old, or disabled; AND be "insured" by having earned the required credits.
		(G4- Screenshot) (p)	These are paid on the 2 nd , 3 rd , or 4 th Wednesday depending on the beneficiary's date of birth.
			There are 3 different types of payments under RSDI. They are: retirement, survivors, and disability benefits.
		(G5- Retirement) (p) payable at	Retirement benefits are payable at full retirement age
		(p)and a reduced benefit	and a reduced benefit is available as early as age 62.
		(p) Full retirement age	Full retirement age is 65 for workers born before 1938 and gradually increases until it reaches 67 for workers born in 1960 or later.
		(G6 –Survivors)	Survivors' benefits are paid if the worker dies.
		(p) Certain	Certain family members may be eligible for benefits if the worker earned enough Social Security credits.
			And

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
		(G7- Disability benefits)	Disability benefits are payable at any age to workers,
		(p) who have	who have enough Social Security credits and
		(p) who suffer	who suffer a physical or mental condition that prevents
			them from performing any significant kind of work for at
			least 12 continuous months or result in death.
	RETAPE		Felecia
		(G8- Supplemental) (p) is a federal income	SSI is a federal income maintenance program designed to provide cash assistance for the aged, blind or disabled persons with little or no income or resources.
			SSI payments are paid under Title XVI of the Social Security Act and are financed from the federal general revenues and not from Social Security taxes
		(G9- SSI Eligibility)	To be eligible,
		(p) an individual	an individual must be a resident of the United States, including the District of Columbia and the Northern Mariana Islands or legally admitted alien AND be
		(p) Age 65	 Age 65 or older, blind, OR disabled AND
		(p) Have limited	Have limited income and resources.

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			SSI isn't just for adults. Children can also receive SSI if they're blind or disabled. However, for them, we have to count their parents' income and resources.
		(G10 -Screenshot) (p)	SSI recipients receive their payments on the first of the month and the check amount may vary depending on what state the individual lives in
			Unlike Social Security, the law requires that we regularly review each case to ensure continued eligibility for an SSI payment and the payment is correct. This review is called a redetermination or RZ.
		(G11-Redeterminations) (p)	For an RZ, we'll ask the recipient or representative payee to provide information about:
		(p) Income(p) bank accts(p) resources(p) living arrangements	 income bank accounts resources, and
			• living arrangements These RZs can be conducted by mail, over the phone, or in person. SSA will notify the recipient or rep payee when an RZ is due.
	RETAPE		Felecia – Chad I want to also discuss the events that might affect entitlement to SSI. This is different than Social Security disability because it is based on need.
			Chad - Yes absolutely. However, there are some events that

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			affect both programs. Why don't we discuss those first?
			Felecia:
			Good idea.
	RETAPE		Chad:
		(G12- Events that Affect)	The events that affect both programs are:
		(p) if the medical	 If the medical condition improves,
		(p) Any work changes	Any work changes, such as starting or stopping
		(p) Incarceration	work, And Incarceration
	RETAPE		Felecia:
		(G13-Events that Affect)	Right and for SSI
		(p) Marital status	 Marital status changes—For example, marriages, divorce, or annulment of marriage
		(p) Changes in household	 Changes in household. For example, if recipient moves OR someone moves in or out of the place where the recipient lives). OR
		(p) Changes in income	Changes in income or resources

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			Chad:
			That's right and failure to report these changes promptly to SSA and to promptly return any benefit check that the recipient may no longer be entitled to may result in an overpayment that must be repaid. You can make your reports by telephone, mail or in person, whichever you prefer. SSA will advise you whether any additional evidence is needed and how the benefits may be affected.
			Felecia:
			Exactly. That's why it's very important that you keep SSA informed of any changes.
			All right. sending it back to you Ana
			Ana- OK, it looks like we reached our first stop. Here's Professor Ollie with some questions for you.
	VINCE FURNARI	Professor Ollie	KNOWLEDGE CHECKPOINT
			Ana
			Thanks! That was a great summary of our programs.
			At the end of the presentation we'll give you the website where you can find all the publications and other resources to
			help make your job as a rep payee easier.

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			Now, let's move on to our next destination, "Who needs a rep payee. " But first, let's talk about the representative payee program. Charmaine, why was this program created?
		(G14 –Why was Program)	Charmaine- It was created to assist the most vulnerable members of society
		(p) the young	—the young,
		(p) elderly	the elderly,
		(p) and disabled	and the disabled
		(p) who are not	who are not capable of managing or directing someone else to manage their benefits.
			While most people receive their benefits directly, others need assistance.
		(G15- Program works)	This program works best when there is
			collaboration between
			SSA, the payee and the beneficiary.
			And by providing rep payees with a clear understanding of
			their role, and providing support to execute their duties, we can ensure that benefits are used in the best interest of our

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			beneficiaries.
			Ana- There are two types of rep payees right?
			Charmaine- Yes there are.
			Ana – what are they?
			Charmaine
			Well, basically they're individual and organizational.
		(G16- Two Types of) (p) an individual	An individual rep payee is a person, usually a family member or friend whom the beneficiary trusts with his or her finances. This includes a parent serving as payee for his or her minor child.
			And
		(p) an organization, often	An organizational payee is an organization, often one which provides care and treatment for the beneficiaries who reside in the institution or in off-site facilities affiliated with the institution. For example, nursing homes, hospitals, group homes or a halfway house.
			Ana
			Yes and in this video we're concentrating on individual payees. If you're an organization applying to be a payee,

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			please watch the video on organizational payees.
			Ana
			Charmaine, tell us who needs a rep payee for SSA purposes? Can you talk about how is it decided?
			Charmaine
		(G17- Who Needs a Rep Payee)	Rep Payees are assigned to beneficiaries who fall into three basic categories:
		(p) Children	Children—almost all children under age 18 have
		(p) Beneficiaries	payeesBeneficiaries determined by a court of law to be
		(p) As I mentioned	 legally incompetent, and As I mentioned earlier, beneficiaries determined by SSA to be incapable of managing or directing the management of their money.
			Ana
			So can anyone who wants a payee have a payee? What I mean is, can someone have a payee because it is easier for them?
			Charmaine
			No Ana, representative payment is not a convenience. We

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			select a payee when someone is not able to manage or direct the management of their finances because of their age, or a mental or physical impairment. We will never appoint a representative payee solely for a beneficiary's convenience or their personal preference.
			Now you should report to us if a beneficiary is receiving their Social Security or SSI payments directly and you believe they have lost the ability to manage their money. And we'll determine if the beneficiary is incapable and appoint a payee as appropriate.
			Ana
			That's right, and, on the other hand, if you're the payee for someone who is showing signs of improvement, and you think he/she may be able to manage their own money, report it to us, right?
			Charmaine
			Yes absolutely, and we'll schedule an interview with the beneficiary to determine whether he/she is now capable of handling his or her own payments.
			Ana
			Oh and how about if someone has power of attorney? Does

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			that entitle them to be a rep payee for that individual?
			Charmaine
			No, for Social Security purposes, having power-of-attorney or a joint bank account with the beneficiary IS NOT the same thing as being a representative payee. Although having a power-of-attorney may be a convenient way to pay bills and handle some legal matters, it does not include provisions for the responsibility and accountability that Social Security requires of its payees.
			Ana
			OK so even if you have power-of-attorney, you must apply to be a rep payee with Social Security?
			Charmaine
			Yes! Exactly. Ana Ok Latia have a guick discussion on have SSA calente a
			Ok. Let's have a quick discussion on how SSA selects a payee. SSA gives special attention to those vulnerable beneficiaries who have no relatives or close friends to assist them in the day-to-day management of their lives. We have to be very careful in determining and selecting a payee for these beneficiaries right?
			Charmaine

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			Oh yes. We investigate a representative. During the face-to- face interview, we'll ask questions to determine the suitability of the payee.
			Like these.
			Video with CRs interviewing payees.
			Ana- Well those were fantastic questions weren't they?
			Charmaine- yes they were.
			Ana- The CRs were gathering very important information to help determine the suitability of the applicants.
			Charmaine
			Yes. We want to make sure we select the most appropriate payee for the recipient.
			Ana
			Now, say a recipient has a payee and someone else comes
			in to file to be a payee for that same recipient, does SSA notify the current payee?
			Charmaine
			Yes we do. We generally contact the current payee. In

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			addition, we'll investigate thoroughly any allegations or questions raised about the current payee's continued suitability to serve before determining if we need to change the payee. SSA will send a notice advising that payee if and when the change is processed.
			Ana
			Ok great! It looks like we're coming up to our next station. Let's see what Professor Ollie has for us. Make sure you can answer his questions before we can move on.
	VINCE FURNARI	Professor Ollie 2	KNOWLEDGE CHECKPOINT
		REMOVAL OF KRISTIE & ELDER ABUSE	
		**Will need to make sure there is a smooth transition to ANA & the next Train station	
			Ana
			Ohhh it sounds like we reached our next destination.
			Duties and Responsibilities of a Rep Payee.
			Charmaine
			A rep payee's primary responsibility is to use the payments in the beneficiary's <i>best interest</i> . This is by making sure that the beneficiary's current and foreseeable

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			needs are being met.
		CG with beneficiary's best	Ana
		interest	What do you mean by "current and foreseeable?"
			Charmaine
			That's a good question!
		G19-G21 - Pics	It means, primarily
			food,
			shelter,
			clothing,
			and medical expenses not covered by Medicare, Medicaid or provided by a residential institution.
			If the beneficiary is in a residential institution, the payee is responsible for using social security funds to pay the institution's fees.
			Once these needs are satisfied, the payee can conserve the money in a checking or savings account for the beneficiary.
			You may also use remaining funds for the beneficiary's personal comfort items, recreation, and miscellaneous expenses.

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			Ana
			Can you give us some examples of miscellaneous expenses?
			Charmaine
		(G22) Pics	Things like:
			Health and hygiene items,
			Home furnishings,
			Transportation expenses,
			 Hobby and craft items; and Therapeutic equipment recommended by a doctor or appropriate therapist, and not covered by any other source.
			Ana
			Can the money be used for other members of the family?
			Charmaine
			Another good question Ana.
			You can use retirement and T2 disability funds for legal dependents, But not SSI funds. SSI funds are just for the recipient's expenses.

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			Ana Oh OK good. Another important aspect of a rep payee is reporting changes on time, Right?
	RETAPE	TRANSITION TO SINGLE	Charmaine Oh you got that right. Like Chad stated earlier, if changes are not reported timely, an overpayment can occur and all the overpaid money will have to be return to SSA. It's imperative that these events are reported to us immediately. Let's go back to Chad and Felecia so they can discuss this further.
	RETAPE	CG: OTS Bullets come in behind Chad (p) Beneficiary moves (p) starts/stops working (p) marries, divorces, marriage annulled (p) beneficiary or beneficiary's spouse dies (p) unable to contact beneficiary	 Chad Some of the reporting responsibilities are: The beneficiary moves; The beneficiary starts or stops working; or The beneficiary marries, divorces or has a marriage annulled as we already stated; as well as The beneficiary, or the beneficiary's spouse dies; You are unable to contact or locate the beneficiary The beneficiary's name changes;

Bookmark Title S	Small Window Cues*	Large Window Cues**	Script
		 (p) name changes (p) condition improves (p) leaves or plans to leave US (p) immigration or citizenship status changes (p) confined to correctional institution or has warrant (p) no longer needs payee 	 The disabled beneficiary's condition improves; The beneficiary leaves or plans to leave the U.S. for 30 consecutive days or more; The beneficiary's immigration or citizenship status changes; The beneficiary is confined to a correctional institution or has an unsatisfied warrant; or The beneficiary no longer needs a payee;
	ETAPE	CG:OTS Bullets come in behind Felecia (p) countable resources exceeding \$2,000 for individual, or \$3,000 for couple (p) Moves from institution (p) separates or begins living with spouse (p) household composition changes (p) gives birth (p)changes in wages or government payments	 Felecia: Now since SSI is based on need, you must also report these events: If the beneficiary acquires or accumulates countable resources that exceed \$2,000 for an individual, or \$3,000 for a couple; The beneficiary moves, even temporarily, to or from a hospital, nursing home or other institution; A married beneficiary separates from his or her spouse, or they begin living together after a separation; Someone moves into or out of the beneficiary's household; The beneficiary gives birth to a child; The beneficiary has any change in wages or government payments; or

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
		(p) Starts/stops receiving income of any kind	The beneficiary or the beneficiary's child starts or stops receiving a pension or other income of any kind
			Alright, that's it for us, back to you Ana.
			Ana Thank you for this valuable information. Now Charmaine, I
			really think this is probably the MOST important part of the training.
			Charmaine
		CG: L3 1-800-772-1213	<u>I agree, and to report changes, you can call our toll-free</u> <u>number, 800-772-1213, or call, fax or visit your local Social</u> <u>Security office.</u>
			When you contact us, you must have on hand the beneficiary's name, SSN, date and place of birth, mailing
			address and one other unique identifier such as benefit amount.
			Ana
			Besides the regular items that you must report, we have annual reports that you must complete. At least once per
			year, we will ask you to report on how you used or saved the benefits you received. Therefore, you must keep records of

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			deposits and expenses.
			Charmaine
			That's right Ana. If you are responsible for more than one beneficiary, you must keep separate records, for each beneficiary for whom you are payee, for at least 2 years. You must keep records of all payments we make to you, all bank statements, and receipts or cancelled checks for rent, utilities, and any major purchases made for the beneficiary.
			Ana
			OK. I know there are restrictions to what you can do as a rep payee.
			Charmaine
			Oh yes. We appoint a payee to manage social security and SSI benefits ONLY . Being a payee does <i>not</i> give you authority for anything else related to the beneficiary or recipient.
			Here's a list of things you are cannot do as a payee.
	VOICE OVER WITH THESE	Animated Pictures in After Effects	(Maurice voice over) Tape
	BULLETS.	*CHANGE NEGATIVE IMAGES AT TIMESTAMPS	 Manage or control the beneficiary's non-social security income; these are wages, pensions, dividends or any income from sources other than

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
		32:38 32:46 35:32	 Social Security or SSI benefits. Use the benefits for anything other than the beneficiary's needs; Spend the funds in a way that would leave the beneficiary without necessary items or services; that includes housing, food, clothing, medical
	RETAPE	V/O needed:	 care, etc; Deposit the benefits in yours, or another person's account unless you are a parent or spouse OR in your organization's operating account. Keep the beneficiary's conserved funds if you are no longer the payee; Charge the beneficiary for payee services unless your organization has our written authorization to do this Make medical decisions for the beneficiary; Sign legal documents on behalf of the beneficiary; or Lend the funds to anyone else, including other beneficiaries you serve (this includes using funds held in a collective account to make up a shortfall when another beneficiary's expenses exceed his/her ownership interest in the account); and
			 you must never sacrifice a beneficiary's needs to pay other expenses, a past debt, or to accumulate

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			conserved funds.
			Ana OK, it looks like Professor Ollie is ready for some more questions for youGood luck!
	VINCE FURNARI	Professor Ollie 3	KNOWLEDGE CHECKPOINT
			Ana
		GET JUSTIN TO REMOVE	Very good. We're on our way to our final destination.
		WORD	Let's welcome Kristie Boutte back to talk about how to use the benefits.
			Kristie
			As previously stated, a rep payee's primary responsibility is
			to ensure the beneficiary's current needs are met. You must
			never sacrifice a beneficiary's needs to pay other expenses,
			a past debt, or to accumulate conserved funds.
		(G23-Payments Exempt)	Social Security and SSI payments are generally exempt from seizure by creditors
		(p) If,	but if the failure to pay an old debt could result in negative consequences like homelessness,
		(p) Then	then you should do your best to settle the debts.
		(G24- Large Payment)	For various reasons, a beneficiary might receive a large
		PIP – Kristie on screen	payment covering several months, or even years, of past

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			due benefits.
		(p) If	If this happens,
		(p) First	your first responsibility is to ensure the beneficiary's current and foreseeable needs are met.
		(p) Then	Funds not needed for the beneficiary's current maintenance may be deposited in an interest-bearing or dividend-bearing account in a bank, trust company, credit union, or savings and loan association that is insured under either Federal or State law.
		(p)(p)	Any interest earned belongs to the beneficiary and not to the payee.
		(G25- How to Use) (p)	Remember, for Social Security (not SSI) beneficiaries living in an institution whose current maintenance needs are being met,
		(p) you	you may use part of the funds to support the beneficiary's legally dependent spouse, child or parent.
		(p) However,	However, you should contact Social Security before doing so.
		(G26-How to Use cont) (p)	You may also reimburse yourself from the beneficiary's funds for actual expenses incurred in providing services for the beneficiary.

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
		(p) Some typical	Some typical reimbursable expenses are the cost of
			money orders, transportation costs, etc.
		(p) to claim a	To claim a reimbursement, you must keep records of
	DETADE		your expenses AND you must contact SSA first!
	RETAPE	V/O needed to correct this statement	
		Statement	That's it for me, back to you Ana.
			Ana
			Kristie thanks for all the information you provided.
			Kristie
			Anytime!
			Ana
			Let's talk a little bit about direct deposit. A law went into
			effect March 1, 2013, requiring that you receive your Social Security and SSI payments electronically.
			Security and SSI payments electronically.
			Charmaine
			That's right Ana.
	RETAPE	TRANSITION TO SINGLE	There are different accounts that can be used such as
		SHOT	dedicated accounts, collective accounts, and regular
			checking and savings accounts.
			Dedicated accounts are for disabled and blind children. We
			won't be discussing it during this training, but will in the - Name/Info (N/A) No Image (VO) Voice Over

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			videos dedicated to payees for children.
		* This was OISP's exact language.	Both Individual and Organizational payees can use collective accounts. Institutions, agencies, and individuals who serve as representative payees for a large number of beneficiaries often ask the SSA if they can hold Social Security or SSI benefit payments in one savings or checking account. Using collective accounts may reduce a payee's administrative burden of maintaining individual accounts for each beneficiary. Now when opening up a checking or savings accounts for you and the individual you'll be a payee for, make sure you don't mix your money with that of the beneficiary's.
		CG: L3 Payee's name FOR beneficiary's name	The account should be titled "your name FOR beneficiary's name." Ana For example Ana Obrebski FOR Charmaine Gibson. Ana I know we've been giving you a lot of information about
			payments, accountability, and record keeping. Being a rep payee is a huge responsibility. This individual is depending on you to meet their daily needs and ensure their money is in

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			good hands and spent the way it's supposed to. We take this very seriously here at SSA.
			Charmaine
			Yes. We really want to thank you for taking on this huge responsibility. Ana if you don't mind, I'll like to share with the viewers a few ideas on how they can assist the beneficiaries in other ways.
			Ana
			Oh absolutely! Go ahead.
			Charmaine OK. Here they are.
	Video with Maurice's voice- over	Animated Pics	 MAURICE VOICE-OVER Meet regularly with the beneficiary (preferably face-to-face); Establish a budget, discuss it with the beneficiary, and involve him/her as much as possible in financial decisions; Explain Social Security and/or SSI payments and the beneficiary's expenses to him or her; Ensure that the beneficiary is aware of current and large retroactive payments and what the

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
			 beneficiary's options are in regard to entitlement and overpayments for SSI and/or Medicaid; Help the beneficiary find other services he or she needs (e.g., food stamps, housing subsidies, etc.); Help the beneficiary fill out applications for other needed services and cooperate with caseworkers; Help the beneficiary get medical treatment, when necessary; Negotiate with landlords and others to get "the best possible deal" for the beneficiary; Help the beneficiary file income tax returns. Note that the beneficiary may owe taxes on Social Security payments or may be due a refund. Also, the beneficiary may be entitled to an earned income tax credit (EITC) that can be paid throughout the year or included in the federal income tax calculation; and Recommend an alternate person or agency if you cannot longer serve as a representative payee.
			cannot longer serve as a representative payee. Ana We made it to our final destination! Now you know everything there is to know to be a successful and responsible rep payee!! Charmaine Congratulations everyone!

Bookmark Title	Small Window Cues*	Large Window Cues**	Script
		(G27) (P)www.socialsecurity.gov/p ayee	 Ana Charmaine, thank you so much for all the information. Charmaine Thanks for having me. Ana We want to thank you again for your willingness to serve as a rep payee. As I mentioned earlier, SSA takes this responsibility very seriously and will stay on top of any changes or issues that will affect the well-being of our beneficiaries. And, as I promised, You can find all the publications related to rep payee, SSA, and the programs we administer at www.socialsecurity.gov/payee.
			Thanks for watching.