

## Consolidated Listing of Questions for the National Disability Forum on the Advance Designation of Representative Payees

- Does your agency/group/business vet advance designated fiduciary or healthcare proxy candidates? If so, please describe the vetting process.
- How do you inform individuals of their ability to designate others to handle their financial matters in the future? How often do you communicate? What type of communication medium do you use?
- What best practices would you cite in terms of policy, implementation and marketing of this service?
- Do you follow a notification process for individuals at the point they are listed as a future contact, or only at the point of selection?
- How do you address circumstances when those designated to provide future support or services as financial managers or advocates are found to be unsuitable or no longer available? How do you track and make these kinds of determinations?
- What types of processes or policies similar to advance designation does your agency/group/business currently have in place?
- What process does your agency/group/business follow if a beneficiary is found to be incapable of managing his or her own funds? Is the beneficiary given an opportunity to nominate a fiduciary after a finding of incompetence or incapability?
- What business need prompted your agency/group/business to implement this process?
- What pain points did you experience, if any, during implementation and after?
- Have you modified business processes to accommodate changing needs from either the public or your agency?
- What benefits has your agency/organization realized from obtaining the names of possible representatives, financial managers, healthcare proxies, or personal advocates in advance?
- How do these legislative changes impact procedures you may have in place?
- What legal concerns or considerations did you encounter during implementation and/or in the course of administering your policies related to future financial management and planning?
- Do you have a date of "expiration" for the names given to you?
- What demographic do you anticipate would be most likely to utilize Advance Designation? Would there be any possible parallel with populations that may choose to assign a healthcare proxy in advance?
- How do we leverage the annual notification process as a way to ensure continued updates and monitoring of the advance designee lists? Do you envision the public actually updating their Advance Designees annually, or some other frequency?
- Would you recommend that the names of designees expire at a certain point if they have not been updated? If yes when? For what reasons?
- How can the agency effectively collaborate with advocates and stakeholders to strengthen the advance designation process?
- How could the agency educate the public on the option of advance designation?

- Should the impending addition of advance designation influence the initial selection of payees and change of payee policies?
- How do you anticipate that the public would prefer to update their Advance Designees? Via a self-help option on mySocialSecurity? Via phone? In a field office?
- How do you envision advance designation specifically playing a role in future financial management activities within your own agency/group/business?
- How do we discuss advance designation with applicants and beneficiaries to solicit the highest possible quality designations?
- What would be the simplest process for the public?
- What do you envision as designee rights or concerns in this process?
- When do you anticipate members of the public utilizing Advance Designation? At the point of initial claim or as a post-entitlement or post-eligibility update?