



REPRESENTATIVE PAYEE DIRECT DEPOSIT SCREEN PACKAGE

RpDD



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1. Screen Package Document Version Information

The first release of this screen package document as a project deliverable is numbered 1.0.


Subsequent revisions are numbered 1.1, 1.2, 1.3, etc. Content revisions are listed below with corresponding page numbers.

<i>Version Number</i>	<i>Date</i>	<i>Content Revisions</i>	<i>Page #</i>	<i>Revised by</i>
0.1	3/13/2019	N/A	N/A	N/A

2. Screen Designs and Component Descriptions

2.1. myHub

Desktop

Mindy Smith ▾

Accounts

Welcome, Mindy! You last signed in on January 1, 2018 at 10:03 AM EST.

My Account

Not receiving benefits? You can:

- Estimate your **future benefits**
- Print your Online **Social Security Statement**
- Replace your **Social Security Card**

Currently receiving benefits? You can also:

- Print a **letter verifying your benefits**
- View your **current benefit details**
- Update or Enroll in **Direct Deposit**

[Go to My Account](#)


Representative Payee Services

For your beneficiaries, you can:

- View their **current benefit details**
- Update or Enroll them in **Direct Deposit**
- Complete their **Annual Accounting**
- Complete their **Wage Reporting**

[Go to Beneficiary Accounts](#)

[OMB No. 0000-0000](#) | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

 **my Social Security** MENU

Accounts

Welcome, Mindy! You last signed in on January 1, 2018 at 10:03 AM EST.

My Account

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- Complete their **Annual Accounting**
- Complete their **Wage Reporting**

[Go to Beneficiary Accounts](#)

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2.2. Update - Beneficiary Overview

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Beneficiary Overview

Beneficiary Information

Name	Social Security Number	Date of Birth
JOHN APPLE	***-**-0000	10/02/1958

Benefits & Payments

Receiving: **Social Security (Retirement),
Social Security (Survivors)**

Next payment is: **\$753.00 on July 3, 2019
\$50.00 on June 30, 2019**

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement)
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors)

[Update](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.

[Need to report your own wages?](#)

[Switch Account](#)


Quick Links

JOHN APPLE ▲

Overview

- [Representative Payee Annual Accounting](#)
- [Direct Deposit](#)
- [Report Wages](#)

OMB No. 0000-0000 | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

 MENU

Representative Payee Services

Beneficiary Overview

Quick Links ▾

Beneficiary Information

Name
JOHN APPLE

Social Security Number
***.**-0000

Date of Birth
10/02/1958

Benefits & Payments

Receiving:
**Social Security (Retirement),
Social Security (Survivors)**

Next payment is:
\$753.00 on July 3, 2019
\$50.00 on June 30, 2019

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

Account Information ▾

- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)
Current Benefit: Social Security (Retirement)
- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)
Current Benefit: Social Security (Survivors)

[Update](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.


▾ [Need to report your own wages?](#)

[Switch Account](#)

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2.1. Update - Direct Deposit Beneficiary Update

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Direct Deposit Beneficiary Update

Beneficiary Information

Name	Social Security Number	Date of Birth
JOHN APPLE	***.**-0000	10/02/1958

Direct Deposit Information

! **The beneficiary is currently receiving multiple benefits using different payment information.**

Completing this process will update all of the benefit payments to use the same Direct Deposit account. Please call 1-800-772-1213 (or TTY number 1-800-325-0778) if you would like to continue using different payment accounts.

Account Information	Current Benefit(s)
Bank of America	Social Security (Retirement)
PNC Bank	Social Security (Survivors)

Payment Information

How is the account titled? [More information](#)

Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

Account Information [Where can I find this?](#)

Please provide information for the account you'd like to use for the Direct Deposit.

Account Type Routing Number Account Number


When would you like this change to take effect?

Starting with the payment in June 2019

Starting with the payment in July 2019

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 MENU

Representative Payee Services

Direct Deposit Beneficiary Update

Beneficiary Information

Name
JOHN APPLE

Social Security Number
***-**-0000

Date of Birth
10/02/1958

Direct Deposit Information

! The beneficiary is currently receiving multiple benefits using different payment information.

Completing this process will update all of the benefit payments to use the same Direct Deposit account. Please call 1-800-772-1213 (or TTY number 1-800-325-0778) if you would like to continue using different payment accounts.

Account Information

Bank of America

Current Benefit(s): Social Security (Retirement)

PNC Bank

Current Benefit(s): Social Security (Survivors)

Payment Information

How is the account titled? [More information](#)

Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

Account Information [Where can I find this?](#)

Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

Starting with the payment in June 2019

Starting with the payment in July 2019

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2.1.1. More information - Modal

Desktop

More information ✕

For the beneficiary's and your protection, a direct deposit account must be titled in one of the following ways:

- Steve Public (*Representative Payee*) for John Public (*Beneficiary*)
- John Public (*Beneficiary*) by Steve Public (*Representative Payee*)

If both the beneficiary and representative payee's names are listed on the account, this means that one person manages the money for the other. Only one person owns the account. In these examples, Steve handles the money but only John owns the account. You may receive direct deposit to a checking or savings account that uses one of these account title formats.

If you are the representative payee for your spouse or child who live in the same household, you may be listed as the only owner of a checking account. If this is the case, you may select an account titled as "Your Name".

If you are not sure how the account is titled, contact your bank or financial institution.

Close

More information ✕

For the beneficiary's and your protection, a direct deposit account must be titled in one of the following ways:

- Steve Public (*Representative Payee*) for John Public (*Beneficiary*)
- John Public (*Beneficiary*) by Steve Public (*Representative Payee*)

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If you are not sure how the account is titled, contact your bank or financial institution.

[Close](#)

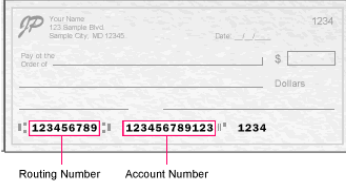
2.1.2. Where can I find my account - Modal

Desktop

Where Can I Find My Account Information? ✕

If your account is in the United States, you can locate your bank or financial institutions Routing Transit Number (RTN) and your account number on one of your blank checks.

At the bottom of your check are three sets of numbers. The Routing Transit Number is usually the first nine numbers in the bottom left-hand corner. The account number is usually the second set of numbers.



Your Routing Transit Number may also appear on your checking or savings account statements.

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

Important: If your account is at a credit union or a small bank, look below the name of your "bank" on the check. If it says "Payable through" and shows the name of another bank:

- They process checks through a different financial institution.
- The Routing Transit Number you need for direct deposit may be different than the number on your account.

You need to contact your bank and ask for the correct Routing Transit Number to use for direct deposit.

If your account is at an investment company or brokerage firm

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

If your account is at an investment company or you wish to have your payments directly deposited into your account at **a brokerage firm** (e.g., Legg Mason, Charles Schwab, etc.), **do not assume** the Account and Routing Transit Numbers printed on your check are correct for your account.

Most investment and brokerage firms are not financial institutions. They usually designate a specific bank for their business transactions. Your investment or brokerage firm account may have a different Bank Account and Routing Transit Number than your personal checking account.

If your account is outside the United States

If you want your benefits deposited directly into an account outside the United States,

1. Contact your nearest U.S. Embassy or Consulate or Social Security office to obtain a "Direct Deposit Sign-Up Form," form SSA-1199, for the country where you want your United States Social Security benefit payments deposited. A list of U.S. Embassies, Consulates and Diplomatic Missions can be found at <http://www.usembassy.gov/>.
2. Have your bank or financial institution complete the form.
3. Use that information to add your direct deposit account information to this application.

Note: If your country is not a participating [International Direct Deposit \(IDD\)](#) country, you will not be able to request direct deposit of your benefits at this time.

[Close](#)

Where Can I Find My Account Information? ✕

If your account is in the United States, you can locate your bank or financial institutions Routing Transit Number (RTN) and your account number on one of your blank checks.

At the bottom of your check are three sets of numbers. The Routing Transit Number is usually the first nine numbers in the bottom left-hand corner. The account number is usually the second set of numbers.



Routing Number Account Number

Your Routing Transit Number may also appear on your checking or savings account statements.

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

Important: If your account is at a credit union or a small bank, look below the name of your "bank" on the check. If it says "Payable through" and shows the name of another bank:

- They process checks through a different financial institution.
- The Routing Transit Number you need for direct deposit may be different than the number on your account.

You need to contact your bank and ask for the correct Routing Transit Number to use for direct deposit.

If your account is at an investment company or brokerage firm

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

If your account is at an investment company or you wish to have your payments directly deposited into your account at a **brokerage firm** (e.g., Legg Mason, Charles Schwab, etc.), **do not assume** the Account and Routing Transit Numbers printed on your check are correct for your account.

Most investment and brokerage firms are not financial institutions. They usually designate a specific bank for their business transactions. Your investment or brokerage firm account may have a different Bank Account and Routing Transit Number than your personal checking account.

If your account is outside the United States

If you want your benefits deposited directly into an account outside the United States,

1. Contact your nearest U.S. Embassy or Consulate or Social Security office to obtain a "Direct Deposit Sign-Up Form," form SSA-1199, for the country where you want your United States Social Security benefit payments deposited. A list of U.S. Embassies, Consulates and Diplomatic Missions can be found at <http://www.usembassy.gov/>.
2. Have your bank or financial institution complete the form.
3. Use that information to add your direct deposit account information to this application.

Note: If your country is not a participating International Direct Deposit (IDD) country, you will not be able to request direct deposit of your benefits at this time.

Close

2.1.3. How is the account titled? - Answer : Beneficiary's Name by Your Name

Desktop

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

Beneficiary's Name by Your Name
 Your Name for Beneficiary's Name
 Your Name
 Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type Routing Number Account Number

When would you like this change to take effect?

Starting with the payment in June 2019
 Starting with the payment in July 2019

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Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

- Beneficiary's Name by Your Name
- Your Name for Beneficiary's Name
- Your Name
- Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

- Starting with the payment in June 2019
- Starting with the payment in July 2019

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2.1.4. How is the account titled? - Answer : Your Name for Beneficiary's Name

Desktop

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type Routing Number Account Number

When would you like this change to take effect?

Starting with the payment in June 2019

Starting with the payment in July 2019

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Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

Starting with the payment in June 2019

Starting with the payment in July 2019

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2.1.5. How is the account titled? - Answer : Your Name

Desktop

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

<input type="radio"/> Beneficiary's Name by Your Name
<input type="radio"/> Your Name for Beneficiary's Name
<input checked="" type="radio"/> Your Name
<input type="radio"/> Other

i If you are the representative payee for a spouse or child who live in the same household, you may be listed as the owner of a checking account.
If you are not the parent or spouse, or do not live in the same household as the beneficiary, select a different account to receive direct deposit or [contact us](#).

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type	Routing Number	Account Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

When would you like this change to take effect?

<input type="radio"/> Starting with the payment in June 2019
<input type="radio"/> Starting with the payment in July 2019

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Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

<input type="radio"/> Beneficiary's Name by Your Name
<input type="radio"/> Your Name for Beneficiary's Name
<input checked="" type="radio"/> Your Name
<input type="radio"/> Other

i If you are the representative payee for a spouse or child who live in the same household, you may be listed as the owner of a checking account.

If you are not the parent or spouse, or do not live in the same household as the beneficiary, select a different account to receive direct deposit or [contact us](#).

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

<input type="radio"/> Starting with the payment in June 2019
<input type="radio"/> Starting with the payment in July 2019

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2.1.6. How is the account titled? - Answer : Other

Desktop

Payment Information

How is the account titled? [More information](#)

Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

- Beneficiary's Name by Your Name
- Your Name for Beneficiary's Name
- Your Name
- Other

! For the beneficiary's and your protection, a direct deposit account must be titled in one of two ways:

- Steve Public (*Representative Payee*) **for** John Public (*Beneficiary*)
- John Public (*Beneficiary*) **by** Steve Public (*Representative Payee*)

If both the beneficiary and representative payee's names are listed on the account, this means that one person manages the money for the other. Only one person owns the account. In these examples, Steve handles the money but only John owns the account. You may receive direct deposit to a checking or savings account that uses one of these account title formats.

If you are the representative payee for your spouse or child who live in the same household, you may be listed as the only owner of a checking account. If this is the case, you may select an account titled as "Your Name".

If you are not sure how the account is titled, contact your bank or financial institution.

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Payment Information

How is the account titled? [More information](#)

Example: "Mindy Smith for JOHN APPLE" or "JOHN APPLE by Mindy Smith"

<input type="radio"/> Beneficiary's Name by Your Name
<input type="radio"/> Your Name for Beneficiary's Name
<input type="radio"/> Your Name
<input checked="" type="radio"/> Other

! For the beneficiary's and your protection, a direct deposit account must be titled in one of two ways:

- Steve Public (*Representative Payee*) for John Public (*Beneficiary*)
- John Public (*Beneficiary*) by Steve Public (*Representative Payee*)

If both the beneficiary and representative payee's names are listed on the account, this means that one person manages the money for the other. Only one person owns the account. In these examples, Steve handles the money but only John owns the account. You may receive direct deposit to a checking or savings account that uses one of these account title formats.

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If you are not sure how the account is titled, contact your bank or financial institution.

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2.2. Update - Direct Deposit Summary

Desktop

Mindy Smith ▾ Switch Account


Representative Payee Services

Direct Deposit Update Summary

Beneficiary Information

Name	Social Security Number	Date of Birth
JOHN APPLE	***.**-0000	10/02/1958

Direct Deposit Information

 **The beneficiary is currently receiving multiple benefits using different payment information.**

Completing this process will update all of the benefit payments to use the same Direct Deposit account. Please call 1-800-772-1213 (or TTY number 1-800-325-0778) if you would like to continue using different payment accounts.


Account Information	Current Benefit(s)
Bank of America	Social Security (Retirement)
PNC Bank	Social Security (Survivors)

Review and Submit

Carefully review the following information for accuracy and make any edits if necessary.

Payment Information Edit

Bank or Financial Institution: **SECU Credit Union**

 [What if this isn't correct?](#)

Account Type: **Checking**


Routing Number: **255076753**

Account Number: **1234567**

Effective Date: **June 2019**

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Representative Payee Services

Direct Deposit Update Summary

Beneficiary Information

Name
JOHN APPLE

Social Security Number
***.**-0000

Date of Birth
10/02/1958

Direct Deposit Information

! **The beneficiary is currently receiving multiple benefits using different payment information.**

Completing this process will update all of the benefit payments to use the same Direct Deposit account. Please call 1-800-772-1213 (or TTY number 1-800-325-0778) if you would like to continue using different payment accounts.

Account Information

- Bank of America**
Current Benefit(s): Social Security (Retirement)
- PNC Bank**
Current Benefit(s): Social Security (Survivors)

Review and Submit

Carefully review the following information for accuracy and make any edits if necessary.

Payment Information

[Edit](#)

Bank or Financial Institution: **SECU Credit Union**

[? What if this isn't correct?](#)

Account Number: **1234567**

Routing Number: **255076753**

Account Type: **Checking**

Effective Date: **June 2019**

Submit

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2.2.1. What if this isn't correct - Modal

Desktop

What if this isn't correct? ✕

If the bank or financial institution we displayed is not what you expected, please check the routing number to make sure it was entered correctly.

If you entered the routing number correctly but the name of your bank or financial institution:

- isn't displayed, please contact your bank or financial institution.
- is listed as "Bank name unavailable," you don't need to do anything.

[Close](#)

Mobile - iPhone 6 Plus Portrait

What if this isn't correct? ✕

If the bank or financial institution we displayed is not what you expected, please check the routing number to make sure it was entered correctly.


If you entered the routing number correctly but the name of your bank or financial institution:

- isn't displayed, please contact your bank or financial institution.
- is listed as "Bank name unavailable," you don't need to do anything.

[Close](#)

2.3. Update - Direct Deposit Confirmation

Desktop


Mindy Smith ▾Switch Account

Representative Payee Services

Direct Deposit Update Confirmation

[Print this page](#)

Confirmation

 **You have successfully updated Direct Deposit on 05/01/2019 for JOHN APPLE.**

- We will confirm your update with a letter before any payment appears in the account.
- Please **do not close the old account** until a payment is deposited into the new one.

Receipt

You have provided the answers below for John Apple.

Today's Date: **05/01/2019**

Payment Information

Bank or Financial Institution: **SECU Credit Union**

Account Type: **Checking**

Routing Number: **255076753**


Account Number: **x4567 (last 4 digits)**

Effective Date: **June 2019**

[Print this page](#)

DoneUpdate Another Direct Deposit

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MENU

Representative Payee Services

Direct Deposit Update Confirmation

[Print this page](#)

Confirmation

 **You have successfully updated Direct Deposit on 05/01/2019 for JOHN APPLE.**

- We will confirm your update with a letter before any payment appears in the account.
- Please **do not close the old account** until a payment is deposited into the new one.

Receipt

You have provided the answers below for John Apple.
Today's Date: **05/01/2019**

Payment Information

Bank or Financial Institution: **SECU Credit Union**

Account Type: **Checking**

Routing Number: **255076753**

Account Number: **x4567 (last 4 digits)**

Effective Date: **June 2019**

[Print this page](#)


Done

[Update Another Direct Deposit](#)

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2.4. Update - Beneficiary Overview - Pending

Desktop

Mindy Smith ▾Switch Account

Representative Payee Services

Beneficiary Overview

Beneficiary Information

Name	Social Security Number	Date of Birth
JOHN APPLE	***-**-0000	10/02/1958

Benefits & Payments

Receiving: **Social Security (Retirement),
Social Security (Survivors)**

Next payment is: **\$753.00 on July 3, 2019
\$50.00 on June 30, 2019**

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

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As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement) Scheduled Update: 06/01/2019
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors) Scheduled Update: 06/01/2019

[Update](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.

▼ [Need to report your own wages?](#)

[Switch Account](#)


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Quick Links

JOHN APPLE ▾

Overview

- [Representative Payee Annual Accounting](#)
- [Direct Deposit](#)
- [Report Wages](#)

 MENU

Representative Payee Services

Beneficiary Overview

Quick Links ▾

Beneficiary Information

Name
JOHN APPLE

Social Security Number
***-**-0000

Date of Birth
10/02/1958

Benefits & Payments

Receiving
**Social Security (Retirement),
Social Security (Survivors)**

Next payment is:
\$753.00 on July 3, 2019
\$50.00 on June 30, 2019

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

Account Information ▾

- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)
Current Benefit: Social Security (Retirement)
[Scheduled Update: 06/01/2019](#)
- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)
Current Benefit: Social Security (Survivors)
[Scheduled Update: 06/01/2019](#)

[Update](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.

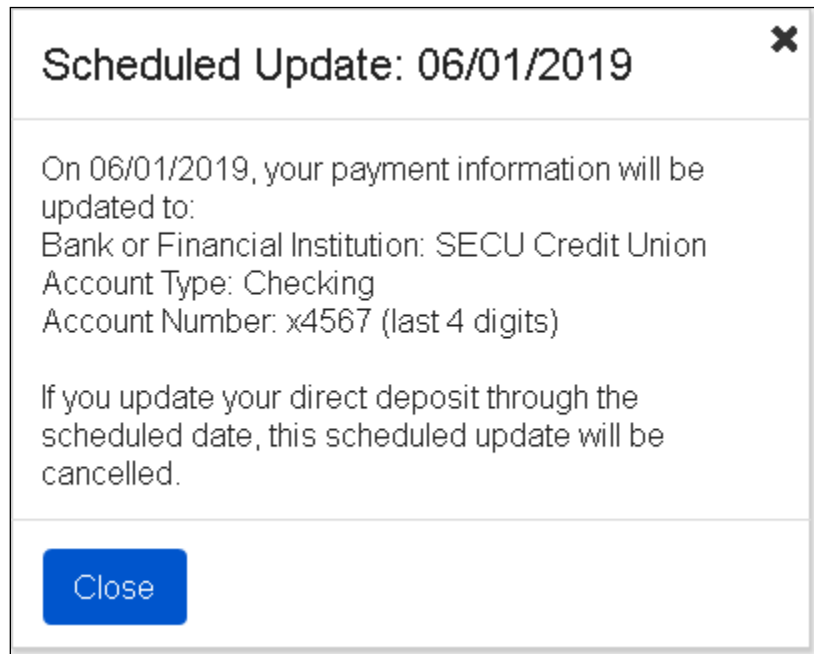
▾ Need to report your own wages?

[Switch Account](#)

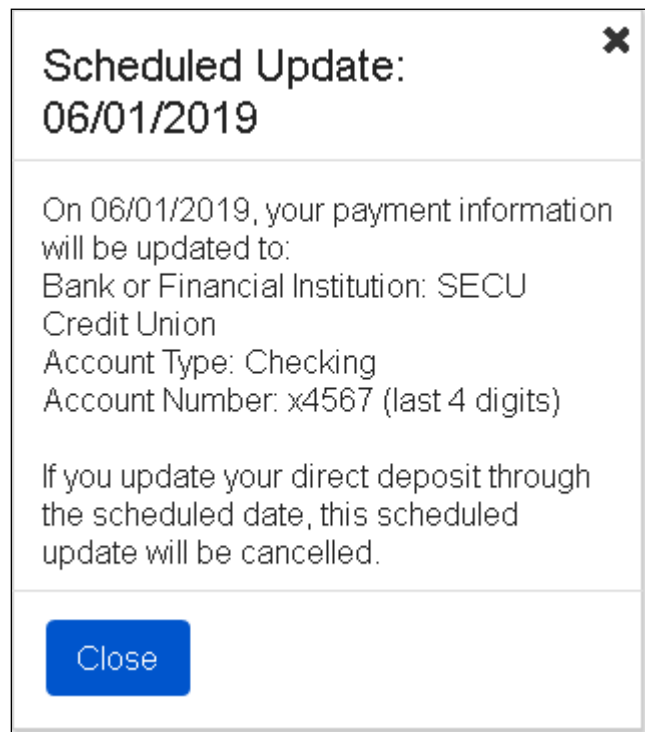
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2.4.1. Scheduled Update - Modal

Desktop




Mobile - iPhone 6 Plus Portrait



2.5. Update - Direct Deposit Multi Beneficiary

Desktop

Mindy Smith ▾Switch Account

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number ***-**-0000	Date of Birth 10/02/1958
--	------------------------------------

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement)
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors)

[Update](#)

JANE DOE


Social Security Number ***-**-1111	Date of Birth 05/25/1960
--	------------------------------------

<u>Account Information</u>	<u>Current Benefit(s)</u>
Paper Check by Mail	Social Security (Disability)

[Enroll in Direct Deposit](#)

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Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number
***-**-0000

Date of Birth
10/02/1958

Account Information

- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)
Current Benefit: Social Security (Retirement)
- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)
Current Benefit: Social Security (Survivors)

[Update](#)

JANE DOE

Social Security Number
***-**-1111

Date of Birth
05/25/1960

Account Information

- Paper Check by Mail
Current Benefit(s): Social Security (Disability)


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2.6. Update - Direct Deposit Multi Beneficiary - Pending

Desktop

Mindy Smith ▾Switch Account

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number	Date of Birth
***-**-0000	10/02/1958

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement) Scheduled Update: 06/01/2019
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors) Scheduled Update: 06/01/2019

[Update](#)

JANE DOE


Social Security Number	Date of Birth
***-**-1111	05/25/1960

<u>Account Information</u>	<u>Current Benefit(s)</u>
Paper Check by Mail	Social Security (Disability)

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Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number
***.**-0000

Date of Birth
10/02/1958

Account Information ▾

- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)

Current Benefit: Social Security
(Retirement)
[Scheduled Update: 06/01/2019](#)

- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)

Current Benefit: Social Security
(Survivors)
[Scheduled Update: 06/01/2019](#)

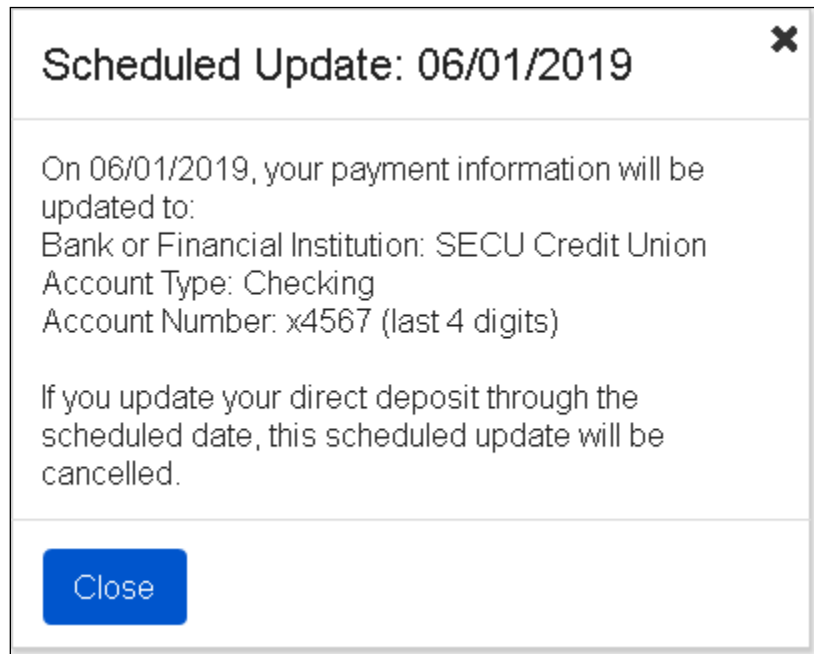
[Update](#)

JANE DOE

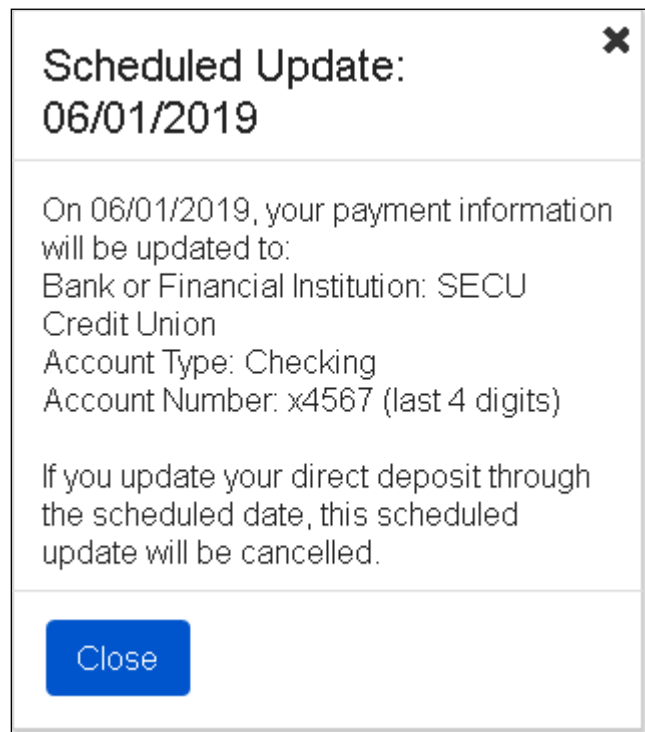
- Paper Check by Mail

2.6.1. Scheduled Update - Modal

Desktop




Mobile - iPhone 6 Plus Portrait



2.7. Enrollment - Beneficiary Overview

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Beneficiary Overview

Beneficiary Information

Name	Social Security Number	Date of Birth
JANE DOE	***-**-1111	05/25/1960

Benefits & Payments

Receiving: **Social Security (Disability)**

Next payment is: **\$753.00 on July 3, 2019**

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

Account Information	Current Benefit(s)
Paper Check by Mail	Social Security (Disability)

[Enroll in Direct Deposit](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.

[Need to report your own wages?](#)

[Switch Account](#)


Quick Links

JANE DOE ▾

Overview

- [Representative Payee Annual Accounting](#)
- [Direct Deposit](#)
- [Report Wages](#)

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Representative Payee Services

Beneficiary Overview

Quick Links ▾

Beneficiary Information

Name
JANE DOE

Social Security Number
***-**-1111

Date of Birth
05/25/1960

Benefits & Payments

Receiving:
Social Security (Disability)

Next payment is:
\$753.00 on July 3, 2019

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

- Account Information
- Paper Check by Mail

Current Benefit(s): Social Security (Disability)

[Enroll in Direct Deposit](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.


▾ Need to report your own wages?

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2.8. Enrollment - Direct Deposit Beneficiary Enrollment

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Direct Deposit Beneficiary Enrollment

Beneficiary Information

Name	Social Security Number	Date of Birth
JANE DOE	***.**-1111	05/25/1960

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

- Beneficiary's Name by Your Name
- Your Name for Beneficiary's Name
- Your Name
- Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.


Account Type	Routing Number	Account Number
<input type="text" value="--"/>	<input type="text"/>	<input type="text"/>

When would you like this change to take effect?

- Starting with the payment in June 2019
- Starting with the payment in July 2019

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 MENU

Representative Payee Services

Direct Deposit Beneficiary Enrollment

Beneficiary Information

Name
JANE DOE

Social Security Number
***-**-1111

Date of Birth
05/25/1960

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

Account Information [Where can I find this?](#)

Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

Starting with the payment in June 2019

Starting with the payment in July 2019

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2.8.1. More information - Modal

Desktop

More information ✕

For the beneficiary's and your protection, a direct deposit account must be titled in one of the following ways:

- Steve Public (*Representative Payee*) for John Public (*Beneficiary*)
- John Public (*Beneficiary*) by Steve Public (*Representative Payee*)

If both the beneficiary and representative payee's names are listed on the account, this means that one person manages the money for the other. Only one person owns the account. In these examples, Steve handles the money but only John owns the account. You may receive direct deposit to a checking or savings account that uses one of these account title formats.

If you are the representative payee for your spouse or child who live in the same household, you may be listed as the only owner of a checking account. If this is the case, you may select an account titled as "Your Name".

If you are not sure how the account is titled, contact your bank or financial institution.

Close

More information ✕

For the beneficiary's and your protection, a direct deposit account must be titled in one of the following ways:

- Steve Public (*Representative Payee*) for John Public (*Beneficiary*)
- John Public (*Beneficiary*) by Steve Public (*Representative Payee*)

If both the beneficiary and representative payee's names are listed on the account, this means that one person manages the money for the other. Only one person owns the account. In these examples, Steve handles the money but only John owns the account. You may receive direct deposit to a checking or savings account that uses one of these account title formats.

If you are the representative payee for your spouse or child who live in the same household, you may be listed as the only owner of a checking account. If this is the case, you may select an account titled as "Your Name".

If you are not sure how the account is titled, contact your bank or financial institution.

[Close](#)

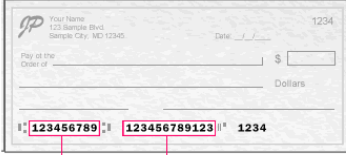
2.8.2. Where can I find my account - Modal

Desktop

Where Can I Find My Account Information? ✕

If your account is in the United States, you can locate your bank or financial institutions Routing Transit Number (RTN) and your account number on one of your blank checks.

At the bottom of your check are three sets of numbers. The Routing Transit Number is usually the first nine numbers in the bottom left-hand corner. The account number is usually the second set of numbers.



Routing Number Account Number

Your Routing Transit Number may also appear on your checking or savings account statements.

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

Important: If your account is at a credit union or a small bank, look below the name of your "bank" on the check. If it says "Payable through" and shows the name of another bank:

- They process checks through a different financial institution.
- The Routing Transit Number you need for direct deposit may be different than the number on your account.

You need to contact your bank and ask for the correct Routing Transit Number to use for direct deposit.

If your account is at an investment company or brokerage firm

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

If your account is at an investment company or you wish to have your payments directly deposited into your account at **a brokerage firm** (e.g., Legg Mason, Charles Schwab, etc.), **do not assume** the Account and Routing Transit Numbers printed on your check are correct for your account.

Most investment and brokerage firms are not financial institutions. They usually designate a specific bank for their business transactions. Your investment or brokerage firm account may have a different Bank Account and Routing Transit Number than your personal checking account.

If your account is outside the United States

If you want your benefits deposited directly into an account outside the United States,

1. Contact your nearest U.S. Embassy or Consulate or Social Security office to obtain a "Direct Deposit Sign-Up Form," form SSA-1199, for the country where you want your United States Social Security benefit payments deposited. A list of U.S. Embassies, Consulates and Diplomatic Missions can be found at <http://www.usembassy.gov/>.
2. Have your bank or financial institution complete the form.
3. Use that information to add your direct deposit account information to this application.

Note: If your country is not a participating [International Direct Deposit \(IDD\)](#) country, you will not be able to request direct deposit of your benefits at this time.

[Close](#)

Where Can I Find My Account Information? ✕

If your account is in the United States, you can locate your bank or financial institutions Routing Transit Number (RTN) and your account number on one of your blank checks.

At the bottom of your check are three sets of numbers. The Routing Transit Number is usually the first nine numbers in the bottom left-hand corner. The account number is usually the second set of numbers.



Routing Number Account Number

Your Routing Transit Number may also appear on your checking or savings account statements.

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

Important: If your account is at a credit union or a small bank, look below the name of your "bank" on the check. If it says "Payable through" and shows the name of another bank:

- They process checks through a different financial institution.
- The Routing Transit Number you need for direct deposit may be different than the number on your account.

You need to contact your bank and ask for the correct Routing Transit Number to use for direct deposit.

If your account is at an investment company or brokerage firm

Please contact your bank or financial institution if you are unable to locate these numbers. They will provide you with the information.

If your account is at an investment company or you wish to have your payments directly deposited into your account at a **brokerage firm** (e.g., Legg Mason, Charles Schwab, etc.), **do not assume** the Account and Routing Transit Numbers printed on your check are correct for your account.

Most investment and brokerage firms are not financial institutions. They usually designate a specific bank for their business transactions. Your investment or brokerage firm account may have a different Bank Account and Routing Transit Number than your personal checking account.

If your account is outside the United States

If you want your benefits deposited directly into an account outside the United States,

1. Contact your nearest U.S. Embassy or Consulate or Social Security office to obtain a "Direct Deposit Sign-Up Form," form SSA-1199, for the country where you want your United States Social Security benefit payments deposited. A list of U.S. Embassies, Consulates and Diplomatic Missions can be found at <http://www.usembassy.gov/>.
2. Have your bank or financial institution complete the form.
3. Use that information to add your direct deposit account information to this application.

Note: If your country is not a participating International Direct Deposit (IDD) country, you will not be able to request direct deposit of your benefits at this time.

Close

2.8.3. How is the account titled? - Answer : Beneficiary's Name by Your Name

Desktop

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

Beneficiary's Name by Your Name
 Your Name for Beneficiary's Name
 Your Name
 Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type Routing Number Account Number

When would you like this change to take effect?

Starting with the payment in June 2019
 Starting with the payment in July 2019

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Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

- Beneficiary's Name by Your Name
- Your Name for Beneficiary's Name
- Your Name
- Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

- Starting with the payment in June 2019
- Starting with the payment in July 2019

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2.8.4. How is the account titled? - Answer : Your Name for Beneficiary's Name

Desktop

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type	Routing Number	Account Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

When would you like this change to take effect?

Starting with the payment in June 2019

Starting with the payment in July 2019

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Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

- Beneficiary's Name by Your Name
- Your Name for Beneficiary's Name
- Your Name
- Other

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

- Starting with the payment in June 2019
- Starting with the payment in July 2019

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2.8.5. How is the account titled? - Answer : Your Name

Desktop

Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

<input type="radio"/> Beneficiary's Name by Your Name
<input type="radio"/> Your Name for Beneficiary's Name
<input checked="" type="radio"/> Your Name
<input type="radio"/> Other

i If you are the representative payee for a spouse or child who live in the same household, you may be listed as the owner of a checking account.

If you are not the parent or spouse, or do not live in the same household as the beneficiary, select a different account to receive direct deposit or [contact us](#).

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type	Routing Number	Account Number
<input type="text" value="--"/>	<input type="text"/>	<input type="text"/>

When would you like this change to take effect?

<input type="radio"/> Starting with the payment in June 2019
<input type="radio"/> Starting with the payment in July 2019

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Payment Information

How is the account titled? [More information](#)
Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

i If you are the representative payee for a spouse or child who live in the same household, you may be listed as the owner of a checking account.

If you are not the parent or spouse, or do not live in the same household as the beneficiary, select a different account to receive direct deposit or [contact us](#).

Account Information [Where can I find this?](#)
Please provide information for the account you'd like to use for the Direct Deposit.

Account Type

Routing Number

Account Number

When would you like this change to take effect?

Starting with the payment in June 2019

Starting with the payment in July 2019

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2.8.6. How is the account titled? - Answer : Other

Desktop

Payment Information

How is the account titled? [More information](#)

Example: "Mindy Smith for JANE DOE" or "JOHN APPLE by JANE DOE"

Beneficiary's Name by Your Name

Your Name for Beneficiary's Name

Your Name

Other

! For the beneficiary's and your protection, a direct deposit account must be titled in one of two ways:

- Steve Public (*Representative Payee*) **for** John Public (*Beneficiary*)
- John Public (*Beneficiary*) **by** Steve Public (*Representative Payee*)

If both the beneficiary and representative payee's names are listed on the account, this means that one person manages the money for the other. Only one person owns the account. In these examples, Steve handles the money but only John owns the account. You may receive direct deposit to a checking or savings account that uses one of these account title formats.

If you are the representative payee for your spouse or child who live in the same household, you may be listed as the only owner of a checking account. If this is the case, you may select an account titled as "Your Name".

If you are not sure how the account is titled, contact your bank or financial institution.

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Payment Information

How is the account titled? [More information](#)

Example: "Mindy Smith for JANE DOE" or "JANE DOE by Mindy Smith"

<input type="radio"/> Beneficiary's Name by Your Name
<input type="radio"/> Your Name for Beneficiary's Name
<input type="radio"/> Your Name
<input checked="" type="radio"/> Other

! **For the beneficiary's and your protection, a direct deposit account must be titled in one of two ways:**

- Steve Public (*Representative Payee*) **for** John Public (*Beneficiary*)
- John Public (*Beneficiary*) **by** Steve Public (*Representative Payee*)

If both the beneficiary and representative payee's names are listed on the account, this means that one person manages the money for the other. Only one person owns the account. In these examples, Steve handles the money but only John owns the account. You may receive direct deposit to a checking or savings account that uses one of these account title formats.

If you are the representative payee for your spouse or child who live in the same household, you may be listed as the only owner of a checking account. If this is the case, you may select an account titled as "Your Name".


If you are not sure how the account is titled, contact your bank or financial institution.

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2.9. Enrollment - Direct Deposit Summary

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Direct Deposit Enrollment Summary

Beneficiary Information

Name	Social Security Number	Date of Birth
JANE DOE	***-**-1111	05/25/1960

Review and Submit

Carefully review the following information for accuracy and make any edits if necessary.

Payment Information Edit

Bank or Financial Institution: **SECU Credit Union**

[? What if this isn't correct?](#)

Account Type: **Checking**


Routing Number: **255076753**

Account Number: **1234567**

Effective Date: **June 2019**

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 my Social Security	MENU
Representative Payee Services	
Direct Deposit Enrollment Summary	
Beneficiary Information	
Name JANE DOE	
Social Security Number ***-**-1111	
Date of Birth 05/25/1960	
Review and Submit Carefully review the following information for accuracy and make any edits if necessary.	
Payment Information	Edit
Bank or Financial Institution: SECU Credit Union	
? What if this isn't correct?	
Account Type: Checking	
Routing Number: 255076753	
Account Number: 1234567	
Effective Date: June 2019	
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2.9.1. What if this isn't correct - Modal

Desktop

What if this isn't correct? ✕

If the bank or financial institution we displayed is not what you expected, please check the routing number to make sure it was entered correctly.

If you entered the routing number correctly but the name of your bank or financial institution:

- isn't displayed, please contact your bank or financial institution.
- is listed as "Bank name unavailable," you don't need to do anything.

[Close](#)

Mobile - iPhone 6 Plus Portrait

What if this isn't correct? ✕

If the bank or financial institution we displayed is not what you expected, please check the routing number to make sure it was entered correctly.


If you entered the routing number correctly but the name of your bank or financial institution:

- isn't displayed, please contact your bank or financial institution.
- is listed as "Bank name unavailable," you don't need to do anything.

[Close](#)

2.10. Enrollment - Direct Deposit Confirmation

Desktop


Mindy Smith ▾Switch Account

Representative Payee Services

Direct Deposit Enrollment Confirmation

[Print this page](#)

Confirmation

 **Congratulations! You have enrolled in Direct Deposit.**

- We will confirm your enrollment with a letter before any payment appears in the account.

Receipt

You have provided the answers below for Jane Doe.
Today's Date: **05/01/2019**


Payment Information

Bank or Financial Institution: **SECU Credit Union**
Account Type: **Checking**
Routing Number: **255076753**
Account Number: **x4567 (last 4 digits)**
Effective Date: **June 2019**

[Print this page](#)

DoneUpdate Another Direct Deposit

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MENU

Representative Payee Services

Direct Deposit Enrollment Confirmation

[Print this page](#)

Confirmation

 **Congratulations! You have enrolled in Direct Deposit.**

- We will confirm your enrollment with a letter before any payment appears in the account.

Receipt

You have provided the answers below for Jane Doe.
Today's Date: **05/01/2019**

Payment Information

Bank or Financial Institution: **SECU Credit Union**
Account Type: **Checking**
Routing Number: **255076753**
Account Number: **x4567 (last 4 digits)**
Effective Date: **June 2019**

[Print this page](#)


Done

Update Another Direct Deposit

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2.11. Enrollment - Beneficiary Overview - Pending

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Beneficiary Overview

Beneficiary Information

Name	Social Security Number	Date of Birth
JANE DOE	***-**-1111	05/25/1960

Quick Links

JANE DOE ▲

Overview

- [Representative Payee Annual Accounting](#)
- [Direct Deposit](#)
- [Report Wages](#)

Benefits & Payments

Receiving:	Social Security (Disability)
Next payment is:	\$753.00 on July 3, 2019

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

Account Information	Current Benefit(s)
Paper Check by Mail	Social Security (Disability) Scheduled Update: 06/01/2019

[Enroll in Direct Deposit](#)

Report Wages

[Submit Pay Stub Information](#)


As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.

[Need to report your own wages?](#)

[Switch Account](#)

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 MENU

Representative Payee Services

Beneficiary Overview

Quick Links ▾

Beneficiary Information

Name
JANE DOE

Social Security Number
***-**-1111

Date of Birth
05/25/1960

Benefits & Payments

Receiving:
Social Security (Disability)

Next payment is:
\$753.00 on July 3, 2019

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

- Account Information**
- Paper Check by Mail

Current Benefit(s): Social Security (Disability)
Scheduled Update: 06/01/2019

[Enroll in Direct Deposit](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.


▾ [Need to report your own wages?](#)

[Switch Account](#)

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2.12. Enrollment - Direct Deposit Multi Beneficiary

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number ***-**-0000	Date of Birth 10/02/1958
--	------------------------------------

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement)
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors)

[Update](#)

JANE DOE


Social Security Number ***-**-1111	Date of Birth 05/25/1960
--	------------------------------------

<u>Account Information</u>	<u>Current Benefit(s)</u>
Paper Check by Mail	Social Security (Disability)

[Enroll in Direct Deposit](#)

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 MENU

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number
***-**-0000

Date of Birth
10/02/1958

Account Information

- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)
Current Benefit: Social Security (Retirement)
- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)
Current Benefit: Social Security (Survivors)

[Update](#)

JANE DOE

Social Security Number
***-**-1111

Date of Birth
05/25/1960

Account Information

- Paper Check by Mail
Current Benefit(s): Social Security (Disability)


[Enroll in Direct Deposit](#)

[Previous](#)

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2.13. Enrollment - Direct Deposit Multi Beneficiary - Pending

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number ***-**-0000	Date of Birth 10/02/1958
--	------------------------------------

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement)
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors)

[Update](#)

JANE DOE


Social Security Number ***-**-1111	Date of Birth 05/25/1960
--	------------------------------------

<u>Account Information</u>	<u>Current Benefit(s)</u>
Paper Check by Mail	Social Security (Disability) Scheduled Update: 06/01/2019

[Enroll in Direct Deposit](#)

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 MENU

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number
***.**-0000

Date of Birth
10/02/1958

Account Information

- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)
Current Benefit: Social Security (Retirement)
- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)
Current Benefit: Social Security (Survivors)

[Update](#)

JANE DOE

Social Security Number
***.**-1111

Date of Birth
05/25/1960

Account Information

- Paper Check by Mail
Current Benefit(s): Social Security (Disability)
Scheduled Update: 06/01/2019

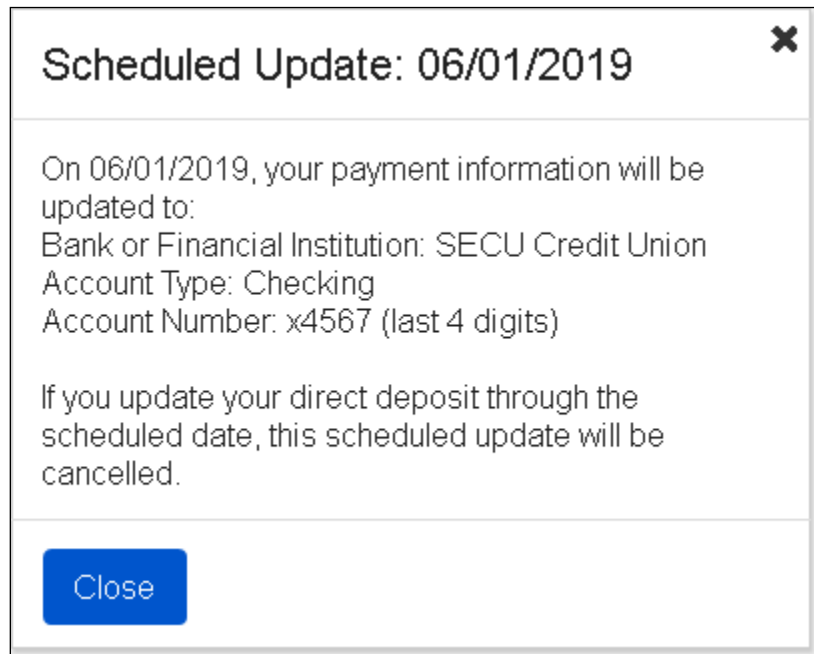
[Enroll in Direct Deposit](#)

[Previous](#)

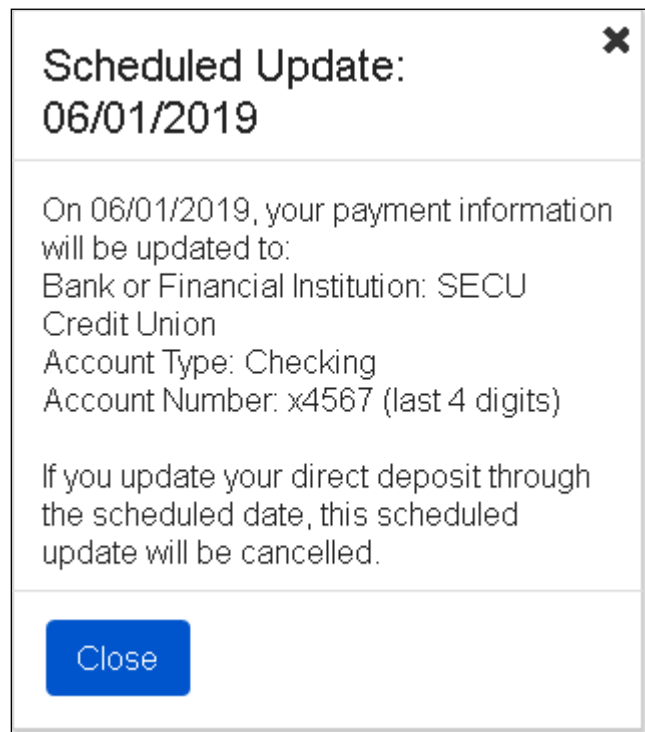
OMB No. 0000-0000 | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

2.13.1. Scheduled Update - Modal

Desktop




Mobile - iPhone 6 Plus Portrait



2.14. Direct Deposit Railroad Board Update Confirmation

Desktop


Mindy Smith ▾Switch Account

Representative Payee Services


Direct Deposit Update Confirmation

[Print this page](#)

Confirmation

 **You have successfully updated Direct Deposit on 05/01/2019 for JOHN APPLE.**

- We will confirm your update with a letter before any payment appears in the account.
- Please **do not close the old account** until a payment is deposited into the new one.

 **Important Notice:** If the beneficiary receives payments through the Railroad Board (RRB), you must contact a local RRB office to inform them of this direct deposit update.

Receipt

You have provided the answers below for John Apple.
Today's Date: **05/01/2019**


Payment Information

Bank or Financial Institution: **SECU Credit Union**
Account Type: **Checking**
Routing Number: **255076753**
Account Number: **x4567 (last 4 digits)**
Effective Date: **June 2019**

[Print this page](#)

[Done](#) [Update Another Direct Deposit](#)

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 MENU

Representative Payee Services


Direct Deposit Update Confirmation

[Print this page](#)

Confirmation

 **You have successfully updated Direct Deposit on 05/01/2019 for JOHN APPLE.**

- We will confirm your update with a letter before any payment appears in the account.
- Please **do not close the old account** until a payment is deposited into the new one.

 **Important Notice:** If the beneficiary receives payments through the Railroad Board (RRB), you must contact a local RRB office to inform them of this direct deposit update.

Receipt

You have provided the answers below for John Apple.
Today's Date: **05/01/2019**

Payment Information

Bank or Financial Institution: **SECU Credit Union**
Account Type: **Checking**
Routing Number: **255076753**
Account Number: **x4567 (last 4 digits)**
Effective Date: **June 2019**

[Print this page](#)


[Done](#)

[Update Another Direct Deposit](#)

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2.15. Direct Deposit Beneficiary Overview - Not Authorized

Desktop

Mindy Smith ▾ Switch Account

Representative Payee Services

Beneficiary Overview

Beneficiary Information

Name	Social Security Number	Date of Birth
JOHN APPLE	***-**-0000	10/02/1958

Benefits & Payments

Receiving: **Social Security (Retirement),
Social Security (Survivors)**

Next payment is: **\$753.00 on July 3, 2019
\$50.00 on June 30, 2019**

Quick Links

JOHN APPLE ▾

Overview

- [Representative Payee Annual Accounting](#)
- [Direct Deposit](#)
- [Report Wages](#)

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement)
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors)

Need to update your Direct Deposit? [Contact us.](#)

Report Wages

[Submit Pay Stub Information](#)


As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.

▾ [Need to report your own wages?](#)

Switch Account

[OMB No. 0000-0000](#) | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

 MENU

Representative Payee Services

Beneficiary Overview

Quick Links ▾

Beneficiary Information

Name
JOHN APPLE

Social Security Number
***.**-0000

Date of Birth
10/02/1958

Benefits & Payments

Receiving:
**Social Security (Retirement),
Social Security (Survivors)**

Next payment is:
\$753.00 on July 3, 2019
\$50.00 on June 30, 2019

Representative Payee Annual Accounting

[Submit Annual Accounting Reports](#)

You currently have accounting reports that are due.

As a Representative Payee, you can submit annual accounting reports online for the beneficiaries you represent.

Direct Deposit Information

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

- Account Information ▾**
- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)
Current Benefit: Social Security (Retirement)
- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)
Current Benefit: Social Security (Survivors)

Need to update your Direct Deposit?
[Contact us.](#)

Report Wages

[Submit Pay Stub Information](#)

As a representative payee for someone receiving Supplemental Security Income (SSI), you can report their wages online.

We are accepting wage reports for the entire month of December 2018. If you need to report wages paid in January 2019, check back beginning February 1, 2019.


▾ [Need to report your own wages?](#)

[Switch Account](#)

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2.16. Direct Deposit Multi Beneficiary - Not Authorized

Desktop

Mindy Smith ▾Switch Account

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number	Date of Birth
***.**-0000	10/02/1958

<u>Account Information</u> ▾	<u>Current Benefit(s)</u>
Bank of America Account Type: Checking Account Number: x3901 (last 4 digits)	Social Security (Retirement)
PNC Bank Account Type: Checking Account Number: x5743 (last 4 digits)	Social Security (Survivors)

Need to update your Direct Deposit? [Contact us.](#)

JANE DOE


Social Security Number	Date of Birth
***.**-1111	05/25/1960

<u>Account Information</u>	<u>Current Benefit(s)</u>
Paper Check by Mail	Social Security (Disability)

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 MENU

Representative Payee Services

Direct Deposit

Direct Deposit Information

Enroll in Direct Deposit or update current account information for each beneficiary below.

With Direct Deposit, the money will go automatically into the designated account every month. You don't have to wait for a check in the mail or go to your bank to deposit the money. It's safe, quick, and convenient.

JOHN APPLE

Social Security Number
***-**-0000

Date of Birth
10/02/1958

Account Information

- Bank of America
Account Type: Checking
Account Number: x3901 (last 4 digits)
Current Benefit: Social Security (Retirement)
- PNC Bank
Account Type: Checking
Account Number: x5743 (last 4 digits)
Current Benefit: Social Security (Survivors)

Need to update your Direct Deposit?
[Contact us.](#)

JANE DOE

Social Security Number
***-**-1111

Date of Birth
05/25/1960

Account Information

- Paper Check by Mail
Current Benefit(s): Social Security (Disability)

[Enroll in Direct Deposit](#)

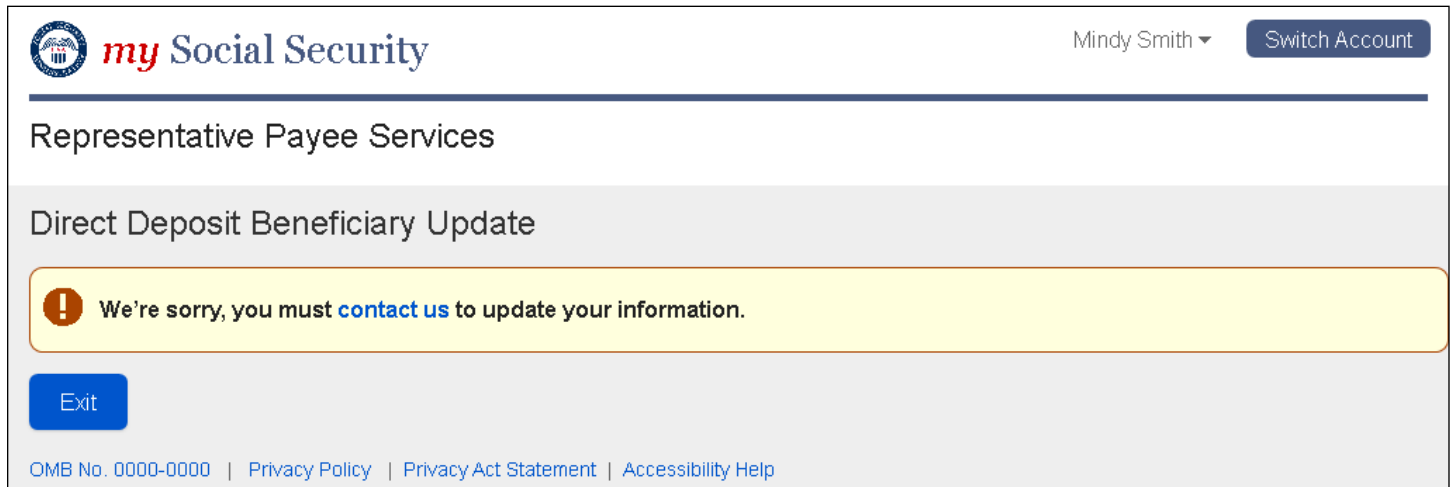
[Previous](#)

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Direct Deposit System Error

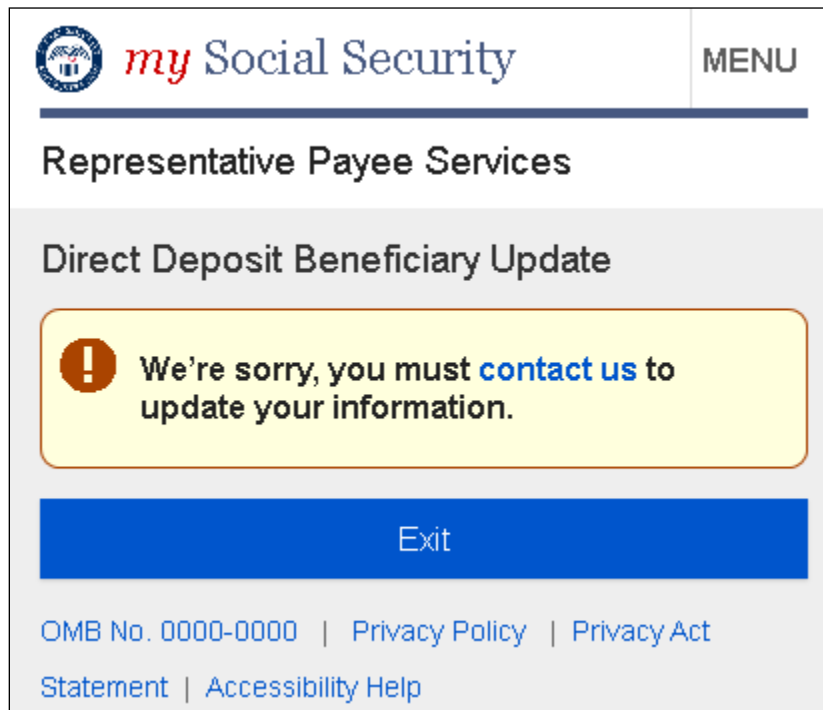
2.17. Direct Deposit System Error

Desktop



The screenshot shows the desktop version of the my Social Security website. At the top left is the my Social Security logo. At the top right, the user name "Mindy Smith" is displayed with a dropdown arrow, and a "Switch Account" button is next to it. Below the header, the page title "Representative Payee Services" is shown. Underneath, the section "Direct Deposit Beneficiary Update" is highlighted. A yellow error message box contains an exclamation mark icon and the text: "We're sorry, you must [contact us](#) to update your information." Below the error message is a blue "Exit" button. At the bottom of the page, there are links for "OMB No. 0000-0000", "Privacy Policy", "Privacy Act Statement", and "Accessibility Help".

Mobile - iPhone 6 Plus Portrait



The screenshot shows the mobile version of the my Social Security website on an iPhone 6 Plus in portrait orientation. At the top left is the my Social Security logo. At the top right, the word "MENU" is displayed. Below the header, the page title "Representative Payee Services" is shown. Underneath, the section "Direct Deposit Beneficiary Update" is highlighted. A yellow error message box contains an exclamation mark icon and the text: "We're sorry, you must [contact us](#) to update your information." Below the error message is a large blue "Exit" button. At the bottom of the page, there are links for "OMB No. 0000-0000", "Privacy Policy", "Privacy Act Statement", and "Accessibility Help".

3. Appendix A - UXG Contact Information for Analysts, Developers and Others

For information about any of the content included in this design specifications document, contact the User Experience Group (UXG) Project Lead for this project and/or the appropriate project team member (for some projects a UXG designer may have specialized knowledge of one or more parts of the design).

To ensure a timely response to your inquiry in case of absence, please cc the UXG Team Lead.

Name	Project Role	Email	Phone	Specialized Project Knowledge
William K. Hanke	UXG Team Lead	William.K.Hanke@ssa.gov	(410) 965-0838	All
Joseph Szabo	UXG Project Lead	Joseph.Szabo@ssa.gov	(410) 265-4191	All
Sepideh Ansari	UXG Designer	Sepideh.Ansari@ssa.gov	(410) 265-4591	All