



## **SCREEN PACKAGE DOCUMENT**

# **SECTION 201, ADVANCE DESIGNATION OF REPRESENTATIVE PAYEE FOR MYSSA**



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## 1. Screen Package Document Version Information


The first release of this 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.

<b><i>Version Number</i></b>	<b><i>Date</i></b>	<b><i>Content Revisions</i></b>	<b><i>Page #</i></b>	<b><i>Revised by</i></b>
1.3	September 26, 2019	Author of initial release and all revisions – Yulia Wentling and Kai Wong	pp. 9-12	N/A

## 2. Screen Designs and Component Descriptions

### 2.1. My Social Security Landing Page

Vincent Lee [Sign Out](#)  
[My Home](#) [Security Settings](#) [Message Center](#)

#### Overview

**Welcome, Vincent!** You last signed in on May 20, 2019 at 10:03AM EDT.

#### Social Security Statement

A Message from the Acting Commissioner:  
[▼ Your Social Security Statement ...](#)

Estimated Benefits at Full Retirement Age (67): **Not applicable**

Last Reported Earnings: **\$0 in 2018** [View Earnings Record](#)

#### Benefits & Payments

You are receiving: **Social Security (Retirement)** [View Benefit Details](#)

Your next payment is: **\$930.20 on May 26, 2019** [View Payment History](#)

[Get a Benefit Verification Letter](#)  
Need proof that you applied for Social Security benefits? Here's your official letter.

#### Advance Designation of Representative Payee

You have the option to designate someone you trust to receive and manage your benefit payments in the event you become unable to do so yourself.  
[Access Advance Designation of Representative Payee](#)

#### Report Wages

[Submit Pay Stub Information](#)

If you are a representative payee for someone receiving Social Security Disability, you may report their wages online.

#### Social Security Card Replacement

If you are not a U.S. citizen, you can request a [replacement card](#) through your [local office](#) or by [mail](#).

If you are a U.S. citizen, please notify your local office.

[Privacy Policy](#) [Accessibility Help](#)

<b>Overview</b>
<a href="#">Benefit &amp; Payment Details</a>
<a href="#">Earnings Record</a>
<a href="#">Replacement Documents</a>
<a href="#">My Profile</a>

A user can access the Advance Designation of Representative Payee application from the teaser placed at the my Social Security landing page.

## Advance Designation of Representative Payee

You have the option to designate someone you trust to receive and manage your benefit payments in the event you become unable to do so yourself.

[Access Advance Designation of Representative Payee](#)

## 2.2. About Advance Designation

A user can review information about advance designation of a representative payee before proceeding.

**my Social Security** Vincent Lee Sign Out

### Advance Designation of Representative Payee

#### About Advance Designation

[^ Hide information about advance designation](#)

You have the option to designate someone you trust to receive and manage your benefit payments on your behalf in the event you become unable to do so yourself.

SSA refers to this person as a representative payee. A representative payee is responsible for ensuring that payments are used for the beneficiary's food, shelter, medical, and personal needs. To be appointed as a representative payee, an individual must be able and willing to serve, and meet SSA selection requirements. To learn more about representative payees, visit <https://www.ssa.gov/payee>.

To name or update your advance designees, please have their phone numbers available. Select the button below to continue with advance designation.

[Continue to Advance Designation](#) [Cancel](#)

[OMB No.0960-NEW](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility Help](#)

NOTE: Once a user accesses the Advance Designation of Representative Payee application, a footer as shown below displays.


[OMB No.0960-NEW](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility Help](#)

The “OMB No.0960-NEW” is a hyperlink to the Paperwork Reduction Act as this is how the UEF is designed and standard to mySSA.

The user has the option to print the Paperwork Reduction Act and the Privacy Act Statement.

### 2.3. Lead-In Question

A user accessed the Advance Designation of Representative Payee application.

 **my Social Security** Vincent Lee [Sign Out](#)

#### Advance Designation of Representative Payee

Your Advance Designation


\* Indicates required information

**\*Would you like to advance designate at this time?**

Yes  No

[Next](#) [Cancel](#)

If the user selects “Yes”, he or she will continue with entering advance designation information.

 **my Social Security** Vincent Lee [Sign Out](#)

#### Advance Designation of Representative Payee

Your Advance Designation


\* Indicates required information

**\*Would you like to advance designate at this time?**

Yes  No

[Next](#) [Cancel](#)

If the user selects “No,” he or she will be advised on how to designate at a later time. A link labeled “contact us” will take the user to a prominent help page at <https://www.ssa.gov/myaccount/help/>.

Vincent Lee [Sign Out](#)

### Advance Designation of Representative Payee

Your Advance Designation

\* Indicates required information

**\*Would you like to advance designate at this time?**

Yes  No

**i** **To advance designate at a later time:**  
Come back to this site or [contact us](#).

[Next](#) [Cancel](#)



## 2.4. Adding Advance Designees

The user can add designees by selecting the “Add Designee” button.

The screenshot shows the 'my Social Security' website interface. At the top left is the logo and 'my Social Security' text. At the top right, the user's name 'Vincent Lee' and a 'Sign Out' link are visible. The main heading is 'Advance Designation of Representative Payee'. Below this is a section titled 'Your Advance Designation' with a text box containing instructions: 'Please enter at least one designee below. If you enter more than one, please provide the names in your order of priority. You may not designate an organization. ? More on order of priority'. Below the text is a table with columns: 'Order of Priority', 'Name', 'Phone', 'Relationship', 'Last Updated', and 'Actions'. The table is currently empty, with the text 'There are no advance designees on record.' displayed below it. A blue 'Add Designee' button is located below the table. At the bottom of the form are two buttons: a blue 'Submit' button and a white 'Cancel' button with a blue border.

The help link explains the term Order of Priority.

This screenshot shows a help modal window titled 'More on order of priority' with a close button (X) in the top right corner. The modal contains the following text: 'Order of priority is the order you want someone to serve as your representative payee.' and 'If the time comes that you need a representative payee, SSA will consider the order you provided when making the payee selection.' A blue 'Close' button is located at the bottom left of the modal. The background shows a blurred view of the 'More on order of priority' link from the previous screenshot.

The “Add Designee” button brings up a lightbox where the user can enter the advance designee’s information.

**Add Designee**

\* Indicates required information

\* **Name**

\* First Middle \* Last Suffix

\* **Phone**

U.S.  International

10-digit Number

\* **Relationship**

Save Cancel

Providing the relationship is optional, but the user must respond to the “Relationship” field. “No response” is the option the user selects when he or she does not want to provide the relationship. When the user selects “Other” from the Relationship dropdown, he or she must enter a relationship.

\* **Relationship**

Child  
Friend  
Neighbor  
Parent  
Sibling  
Significant Other  
Spouse  
No Response  
Other


\* **Relationship**

Other

\* **Please Specify**

## 2.1. Reviewing Advance Designation

After the user provides an advance designation, they will be able to review the list of advance designees. From here, the user can update the designee information, delete one or all designees, and change the order of priority.


Vincent Lee [Sign Out](#)

### Advance Designation of Representative Payee

Your Advance Designation

Please enter at least one designee below. If you enter more than one, please provide the names in your order of priority. You may not designate an organization. [More on order of priority](#)

Order of Priority	Name	Phone	Relationship	Last Updated	Actions
1	Tara Marjorie Lee	(410) 413-5033	Spouse	05/20/2019	<a href="#">Edit</a> <a href="#">Delete</a>
2	Vera Svoboda	(410) 413-5033	Child	05/20/2019	<a href="#">Edit</a> <a href="#">Delete</a>
3	Anton F Bukwa	(301) 937-0112	Social Worker	05/20/2019	<a href="#">Edit</a> <a href="#">Delete</a>

[Change Order of Priority](#)
[Delete All](#)

[Submit](#)
[Cancel](#)

To update designee information, the user selects the “Edit” button, a lightbox displays with the designee’s “Name”, “Phone”, and “Relationship” pre-filled.

**Edit Designee**

\* Indicates required information

\* **Name**

\* First Middle \* Last Suffix

Tara Marjorie Lee --

\* **Phone**

U.S.  International

10-digit Number

(410) 413-5033

\* **Relationship**

Spouse

**Save** **Cancel**

To change the order of priority, the user selects the “Change Order of Priority” button.

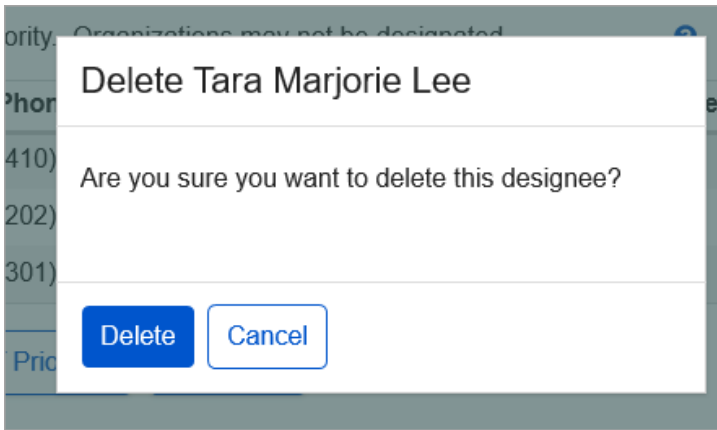
**Change Order of Priority**

The Order of Priority may not be the same for two or more individuals.

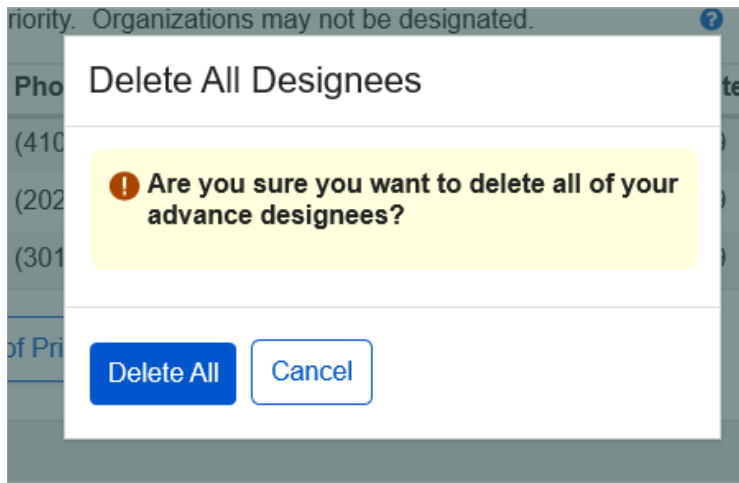
Order of Priority	Name	Phone Number
1	Tara Marjorie Lee	(410) 413-5033
2	Vera Svoboda	(202) 443-1009
3	Anton F Bukwa	(301) 937-0112

**Update** **Cancel**

To delete a designee, the user selects the “Delete” button. The following confirmation message displays.



To delete all designees at once, the user selects the “Delete All” button. The following confirmation message displays.



## 2.2. Receipt

The user can print a read-only confirmation of his or her selections. Below is a sample of the receipt showing the designees on record.

Vincent Lee [Sign Out](#)

### Advance Designation of Representative Payee


Receipt of Your Advance Designation

Order of Priority	Name	Phone	Relationship
1	Tara Marjorie Lee	(410) 413-5033	Spouse
2	Vera Svoboda	(202) 443-1009	Child
3	Anton F Bukwa	(301) 937-0112	Social Worker

[Print this page](#)

**Done**

If the user chooses not to provide advance designation or deletes all of his or her designees, the receipt will indicate this.

Vincent Lee [Sign Out](#)

### Advance Designation of Representative Payee

Receipt of Your Advance Designation

On June 6, 2019, you chose not to provide advance designation of representative payee.

Advance designation allows you to designate someone you trust to receive and manage your payments in the event you become unable to do so yourself.

If you decide to participate in advance designation in the future, please contact us at: <https://www.ssa.gov/myaccount/help/>.

[Print this page](#)

**Done**

### 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 (UX) Lead for this product.

<b>Name</b>	<b>Product Role</b>	<b>Email</b>	<b>Phone</b>	<b>Specialized Project Knowledge</b>
Dave Bell	UXG Technical Advisor	<a href="mailto:David.Bell@ssa.gov">David.Bell@ssa.gov</a>	(410) 966-4248	User Research, Design, UX Mgmt
Yulia Wentling	UX Lead	<a href="mailto:Yulia.Wentling@ssa.gov">Yulia.Wentling@ssa.gov</a>	(410) 265-4607	User Research, Design, UX Education
Kai Wong	UX Designer	<a href="mailto:Christopher.K.Wong@ssa.gov">Christopher.K.Wong@ssa.gov</a>	(410) 265-4690	User Research, Design