

**ADVANCE DESIGNATION OF REPRESENTATIVE PAYEE  
ANNUAL NOTICE**

**SSA NOTICE CLEARANCE PACKAGE**

## Table of Contents

### Contents

|   |          |
|---|----------|
| <b>Section 1 .....</b>  | <b>3</b> |
| <b>BACKGROUND .....</b>   | <b>3</b> |
| <b>Section 2 .....</b>  | <b>5</b> |
| <b>ADVANCE DESIGNATION OF REPRESENTATIVE PAYEE ANNUAL NOTICE.</b>                       | <b>5</b> |
| <b>Section 3 .....</b>  | <b>8</b> |
| <b>ADVANCE DESIGNATION OF REPRESENTATIVE PAYEE<br/>ANNUAL NOTICE.....</b>               | <b>8</b> |
| *b1 FO Address .....  | 10       |
| *b2 Date .....  | 10       |
| *b3 BNC# .....  | 10       |
| *b4 BENEFICIARY NAME .....  | 10       |
| *b5 Beneficiary Address .....   | 10       |
| *b6: 001 Name of Designee/002 Name of Designee/003 Name of Designee .....               | 10       |
| *b7: 001 Designee Phone Number/002 Designee Phone Number/003 Designee Phone Number..... | 10       |
| *b8: 001 Relationship/002 Relationship/003 Relationship.....                            | 10       |

**Section 1**  
**BACKGROUND**

## BACKGROUND

On April 13, 2018, the President signed [H.R. 4547, “The Strengthening Protections for Social Security Beneficiaries Act of 2018”](#) into law (P.L. 115-165). Section 201 of the law allows applicants and beneficiaries to designate individuals to serve as a representative payee should they need one in the future and requires the Social Security Administration (SSA) to consider for selection the designated individual (with certain exceptions). SSA will provide this option to beneficiaries receiving Title 2, Title 8, and Title 16 benefits and applicants when they apply for benefits. Only competent adults 18 years and over, and emancipated minors can advance designate a representative payee.

SSA will collect the minimum information needed to help the agency contact the designated individuals in the future. The beneficiary may waive, withdraw, select, update information, or change the order of priority of the advance designee(s) at any time.

In addition, the law requires SSA to mail an annual notice to the beneficiaries with the name(s) of any individual advance designated. The notice contains:

- Advance Designation of Representative Payee background information, and
- The list of the designee(s) submitted by the beneficiary.

This may result in approximately 59 million notices issued annually to beneficiaries.

This notice will be released through Customer Communications Management (CCM).

We are submitting this revised notice clearance package for the non-sensitive minor changes we made to the existing notice. OCOMM suggested adding mySSA to enable eligible individuals to provide advance designation or make changes on their own through their personal mySSA account to lessen the customer service workload in the Field Office and the Teleservice Center. These minor modifications do not involve any changes to policy.

**Section 2**  
**ADVANCE DESIGNATION**  
**OF REPRESENTATIVE PAYEE ANNUAL NOTICE**

SOCIAL SECURITY  
123 MAIN STREET  
CITY ST 99999

Social Security Administration  
Advance Designation of Representative Payee

September XX, 2020  
BNC: XXXXXXXXX

JANE DOE  
10230 RICHARDSON DRIVE  
ORLANDO FL 22222

SNO Options (generated if the individual has a SNO option)  
SNO002  
SNO004

We are writing to you because you provided us with your Advance Designation of Representative Payee. This letter is an annual reminder of your designation.

### Advance Designation

If you become unable to manage or direct the management of your benefits, we will select a representative payee to receive and manage your benefits for you. Advance designation lets you provide names of people who could serve as your representative payee. If the time comes that you need someone to manage your benefits, we may select one of your advance designees as your representative payee. We will consider your advance designees in your order of priority with certain exceptions. To be appointed representative payee, an individual must be able and willing to serve, and must meet our selection requirements.

### Your Advance Designation Information

Below is a list of the designees you provided, in your order of priority, to serve as your representative payee. Please take some time to review the information for accuracy:

| Order of Priority | Name of Designee | Telephone Number | Relationship |
|-------------------|------------------|------------------|--------------|
| 1                 | John Doe         | xxx-xxx-xxxx     | Spouse       |
| 2                 | Joe Doe          | xxx-xxx-xxxx     | Son          |
| 3                 | Joe Public       | xxx-xxx-xxxx     | Friend       |

You can go online to your personal *my* Social Security account at [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount) or contact us to make the following changes to your designees:

- add or remove a designee,
- update a designee's information,
- change the order of priority, or
- withdraw your advance designation of representative payee.

### **Suspect Social Security Fraud?**

If you suspect Social Security fraud, please visit <https://oig.ssa.gov> or call the Inspector General's Fraud Hotline at 1-800-269-0271 (TTY 1-866-501-2101).

### **If You Have Questions (REFC07)**

REF002 (foreign)

REF003 (domestic)

REF008 (no FO generated by zip)

Social Security Administration

**Section 3**  
**ADVANCE DESIGNATION OF REPRESENTATIVE**  
**PAYEE ANNUAL NOTICE**



**SOCIAL SECURITY**

\*F1 FO Address

**Social Security Administration**

Advance Designation of Representative Payee

\*F2 Date

\*F3 BNC#

\*F4 BENEFICIARY NAME

\*F5 Beneficiary Address

SNO Options (generated if the individual has a SNO option)

SNO002

SNO004

We are writing to you because you provided us with your Advance Designation of Representative Payee. This letter is an annual reminder of your designation.

**Advance Designation**

If you become unable to manage or direct the management of your benefits, we will select a representative payee to receive and manage your benefits for you. Advance designation lets you provide names of people who could serve as your representative payee. If the time comes that you need someone to manage your benefits, we may select one of your advance designees as your representative payee. We will consider your advance designees in your order of priority with certain exceptions. To be appointed representative payee, an individual must be able and willing to serve, and meet our selection requirements.

**Your Advance Designation Information**

Below is a list of the designees you provided, in your order of priority, to serve as your representative payee. Please take some time to review the information for accuracy:

| <b>Order of Priority</b> | <b>Name of Designee</b>  | <b>Telephone Number</b>       | <b>Relationship</b>  |
|--------------------------|--------------------------|-------------------------------|----------------------|
| <b>1</b>                 | *F6-001 Name of Designee | *F7-001 Designee Phone Number | *F8-001 Relationship |
| <b>2</b>                 | *F6-002 Name of Designee | *F7-002 Designee Phone Number | *F8-002 Relationship |
| <b>3</b>                 | *F6-003 Name of Designee | *F7-003 Designee Phone Number | *F8-003 Relationship |

You can go online to your personal *my Social Security* account at [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount) or contact us to make the following changes to your designees:

- add or remove a designee,
- update a designee's information,
- change the order of priority, or
- withdraw your advance designation of representative payee.

### **Suspect Social Security Fraud?**

If you suspect Social Security fraud, please visit <https://oig.ssa.gov> or call the Inspector General's Fraud Hotline at 1-800-269-0271 (TTY 1-866-501-2101).

### **If You Have Questions (REFC07)**

REF002 (foreign)

REF003 (domestic)

REF008 (no FO generated by zip)

Social Security Administration

\*F1 FO Address

\*F2 Date

\*F3 BNC#

\*F4 BENEFICIARY NAME

\*F5 Beneficiary Address

\*F6: 001 Name of Designee/002 Name of Designee/003 Name of Designee

\*F7: 001 Designee Phone Number/002 Designee Phone Number/003 Designee Phone Number

\*F8: 001 Relationship/002 Relationship/003 Relationship