



SCREEN PACKAGE DOCUMENT

SECTION 201, ADVANCE DESIGNATION OF REPRESENTATIVE PAYEE INTRANET



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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.

Version Number	Date	Content Revisions	Page #	Revised by
1.0	September 25, 2019	Author of initial release and all revisions – Yulia Wentling and Kai Wong	N/A	N/A
1.1	July 21, 2021	Removed the notification instructing staff to print receipts locally due to sending all receipt printing jobs to the central printing office.	8 and 11	Yulia Wentling

2. Screen Designs and Component Descriptions

2.1. Emancipated Minors

If the applicant/beneficiary is under age 18, the SSA technician must first ask if they are an emancipated minor.

Advance Designation of Representative Payee Eddie Tech ▾

Advance Designation for Keely McAllister

* Indicates required information

*Is the individual an emancipated minor? [What is an emancipated minor?](#)

☐ Yes ☐ No

[Next](#)

If the applicant/beneficiary is an emancipated minor, then the SSA technician must ask for proof.

Advance Designation of Representative Payee Eddie Tech ▾

Advance Designation for Keely McAllister

* Indicates required information

*Is the individual an emancipated minor? [What is an emancipated minor?](#)

☒ Yes ☐ No

*Did the individual provide proof? [What qualifies as proof?](#)

☐ Yes ☐ No

[Next](#)

If a minor is not emancipated or cannot provide proof of emancipation, they may not advance designate.

Advance Designation of Representative Payee Eddie Tech ▾

Advance Designation for Keely McAllister

* Indicates required information

*Is the individual an emancipated minor? [What is an emancipated minor?](#)

☐ Yes ☒ No

i This minor is not eligible to provide advance designation.

[Next](#)

Advance Designation of Representative Payee

Eddie Tech

Advance Designation for Keely McAllister

* Indicates required information

* Is the individual an emancipated minor?

What is an emancipated minor?

☒ Yes
☐ No

* Did the individual provide proof?

What qualifies as proof?

☐ Yes
☒ No

i

This minor is not eligible to provide advance designation.

Next

Emancipated minors with proof of emancipation will have the option to advance designate.

Advance Designation of Representative Payee

Eddie Tech

Advance Designation for <Name of a Minor>

* Indicates required information

* Is the individual an emancipated minor?

What is an emancipated minor?

☒ Yes
☐ No

* Did the individual provide proof?

What qualifies as proof?

☒ Yes
☐ No

▼

Show information about advance designation

* Would the individual like to advance designate at this time?

☒ Yes
☐ No

Enter designees according to the individual's order of priority. Organizations may not be designated.

More on order of priority

Order of Priority	Name	Phone	Relationship	Last Updated	Actions
There are no advance designees on record.					

Add Designee

Next

Help links allow SSA technicians to look up definitions as well as policy references.

What is an emancipated minor?



Emancipated minor children under the age of 18 with proof of emancipation are eligible to provide advance designation.

Please refer to [GN 00502.085](#) for more information.

Close

What qualifies as proof?



A court document, marriage contract, or U.S. armed forces identification may be accepted as proof of emancipation based on the individual's state of residence.

Close

2.2. Adding Designees

Applicants/beneficiaries age 18 or over and emancipated minors with proof are eligible to advance designate.

Advance Designation of Representative Payee Eddie Tech ▼

Advance Designation for Vincent Lee

* Indicates required information

▼ Show information about advance designation

* Would the individual like to advance designate at this time?

☐ Yes ☐ No

Next

An SSA technician can review information with the applicant/beneficiary about advance designation of a representative payee by selecting “Show information about advance designation.”

Advance Designation of Representative Payee Eddie Tech ▼

Advance Designation for Vincent Lee

* Indicates required information

▲ 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.

* Would the individual like to advance designate at this time?

☐ Yes ☐ No

Next

If the applicant/beneficiary decides not to advance designate at this time, the SSA technician can explain how to go through this process at a later time.

When the SSA technician selects “Next,” a receipt that confirms the applicant/beneficiary declined to advance designate at this time will be sent automatically to the central print. The receipt includes the Privacy Act and Paperwork Reduction Act.

Advance Designation of Representative Payee

Eddie Tech ▾

Advance Designation for Vincent Lee

▼ Show information about advance designation

* Indicates required information

*Would the individual like to advance designate at this time?

☐ Yes

☒ No

i

To advance designate at a later time:

Go online to [my Social Security](#) or contact us.

Next

If the applicant/beneficiary decides to advance designate, the page will display a table where the SSA technician can add a designee.

Advance Designation of Representative Payee

Eddie Tech

Advance Designation for Vincent Lee

* Indicates required information

[Show information about advance designation](#)

* Would the individual like to advance designate at this time?

☒ Yes

☐ No

Enter designees according to the individual's order of priority. Organizations may not be designated.

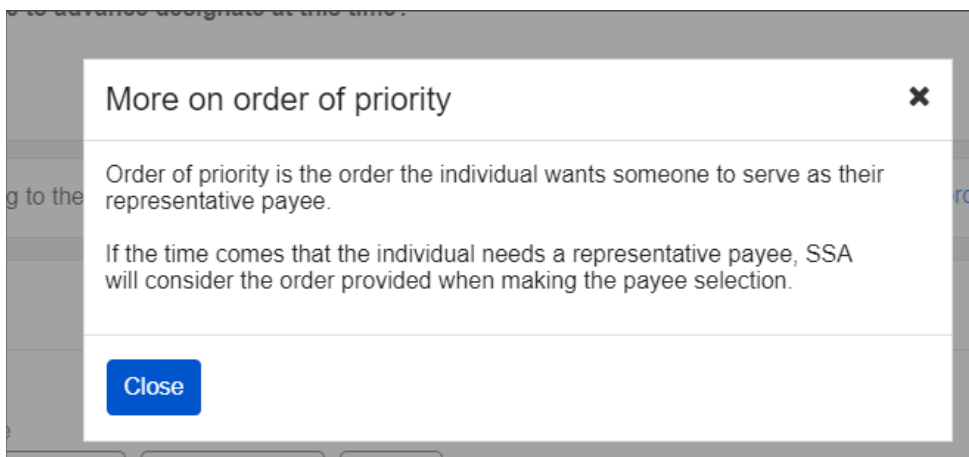
[More on order of priority](#)

Order of Priority	Name	Phone	Relationship	Last Updated	Actions
There are no advance designees on record.					

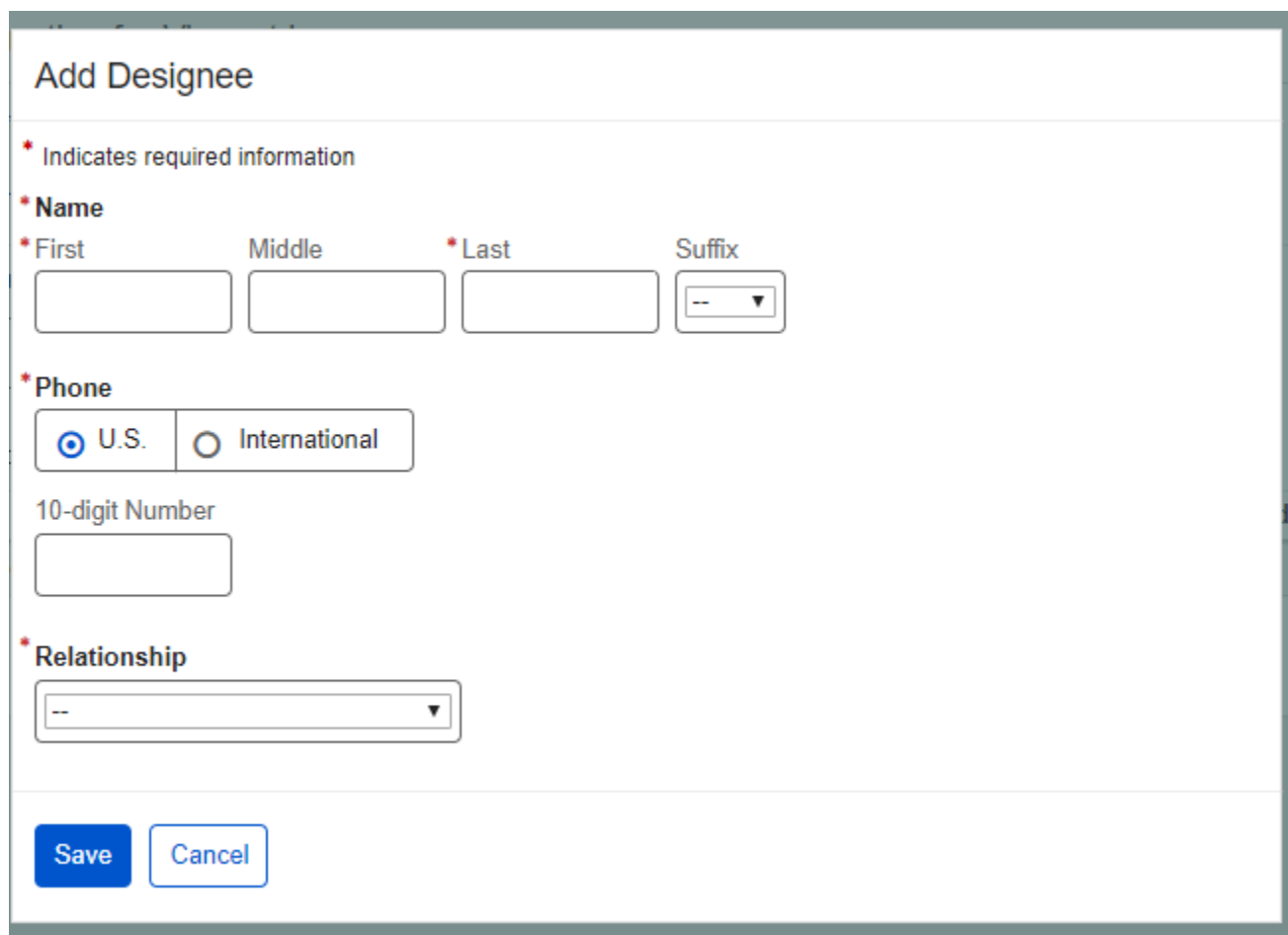
Add Designee

Next

The help link explains the term Order of Priority.

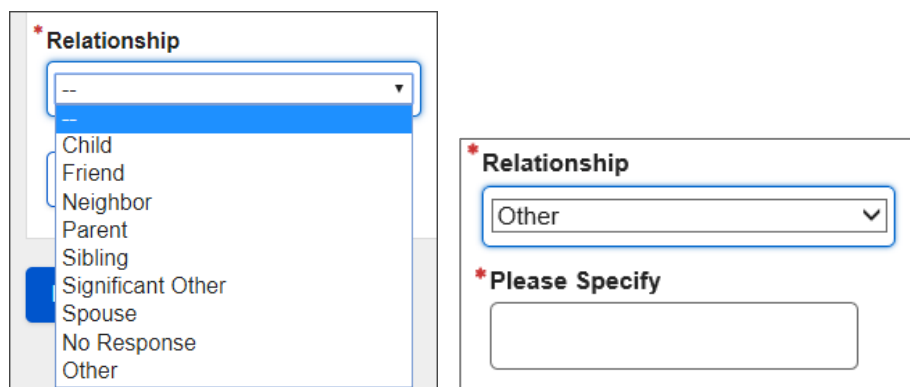


The “Add Designee” button brings up a lightbox where the SSA technician can enter the advance designee’s information.



The screenshot shows a lightbox titled "Add Designee". At the top left, a red asterisk is followed by the text "Indicates required information". Below this, the "Name" section is marked with a red asterisk. It contains four input fields: "First", "Middle", "Last", and "Suffix". The "Last" field is marked with a red asterisk. The "Suffix" field is a dropdown menu with "--" selected. Below the name fields is the "Phone" section, also marked with a red asterisk. It includes two radio buttons: "U.S." (selected) and "International". Below the radio buttons is a text input field labeled "10-digit Number". Below the phone section is the "Relationship" section, marked with a red asterisk. It contains a dropdown menu with "--" selected. At the bottom of the lightbox are two buttons: "Save" and "Cancel".

Providing the relationship is optional, but a response is required in the “Relationship” field. “No response” is the option the SSA technician selects when the applicant/beneficiary does not want to provide the relationship. When the SSA technician selects “Other” from Relationship dropdown, they must enter a relationship.



This block contains two close-up screenshots of the "Relationship" field. The left screenshot shows the dropdown menu open, displaying a list of relationship options: "--", "Child", "Friend", "Neighbor", "Parent", "Sibling", "Significant Other", "Spouse", "No Response", and "Other". The right screenshot shows the dropdown menu with "Other" selected. Below the dropdown menu, there is a section labeled "Please Specify" with a text input field.

2.3. Reviewing Advance Designation

After an applicant/beneficiary provides an advance designation, the Advance Designation page displays the list of advance designees. When the SSA technician selects “Next,” a receipt that confirms the applicant/beneficiary’s advance designation will be sent automatically to the central print. The receipt includes the Privacy Act and Paperwork Reduction Act.

From here, the SSA technician can update the designee information, delete one or all designees, and change the order of priority. When the SSA technician makes any changes and selects “Next,” a receipt that confirms the applicant/beneficiary’s advance designation changes will be sent automatically to the central print. The receipt includes the Privacy Act and Paperwork Reduction Act.

Advance Designation of Representative Payee

Eddie Tech

Advance Designation for Vincent Lee

▼ Show information about advance designation

* Indicates required information

*Would the individual like to advance designate at this time?

☒ Yes
 ☐ No

Enter designees according to the individual's order of priority. Organizations may not be designated. [More on order of priority](#)

Order of Priority	Name	Phone	Relationship	Last Updated	Actions
1	Tara Marjorie Lee	(410) 480-7766	Spouse	05/20/2019	Edit Delete
2	Vera Svoboda	(202) 443-1009	Child	05/20/2019	Edit Delete
3	Anton F Bukwa	(301) 937-0112	Social Worker	05/20/2019	Edit Delete

To update a designee’s information, the SSA technician selects the “Edit” button.

Actions

After selecting the “Edit” button, a lightbox displays with the designee’s “Name”, “Phone”, and “Relationship” pre-filled.

Edit Designee

* Indicates required information

*** Name**

* First

Tara

Middle

Marjorie

* Last

Lee

Suffix

-- ▾

*** Phone**

☒ U.S.

☐ International

10-digit Number

(410) 413-5033

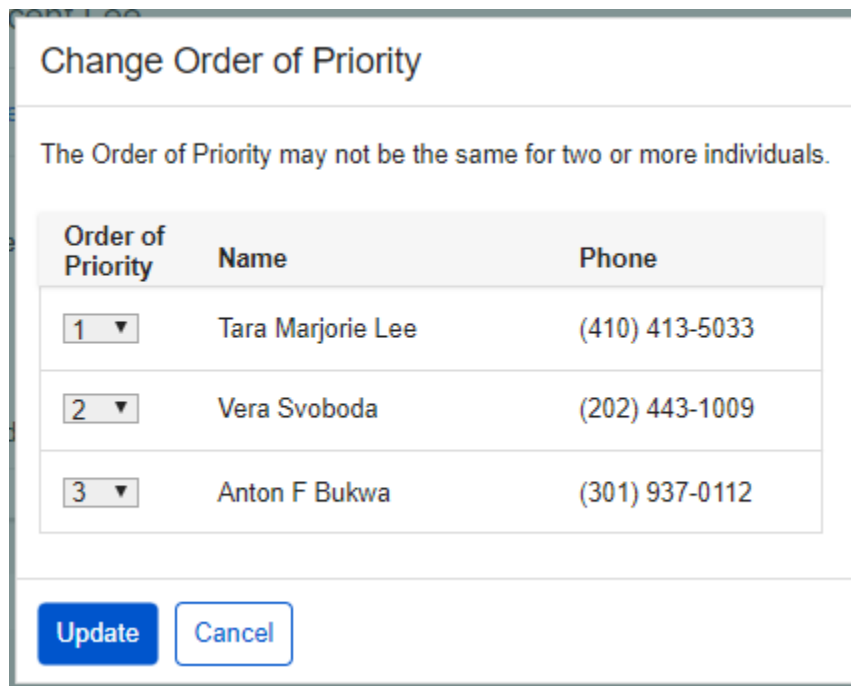
*** Relationship**

Spouse ▾

Save

Cancel

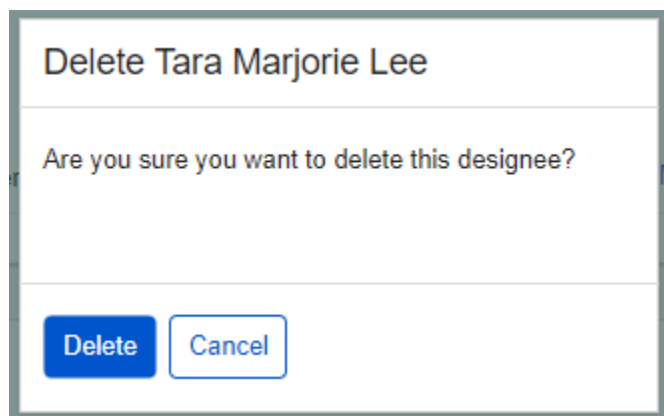
To change the order of priority, the SSA technician selects the “Change Order of Priority” button.



The dialog box titled "Change Order of Priority" contains a message: "The Order of Priority may not be the same for two or more individuals." Below this is a table with three columns: "Order of Priority", "Name", and "Phone". The table lists three individuals: Tara Marjorie Lee (Priority 1, Phone (410) 413-5033), Vera Svoboda (Priority 2, Phone (202) 443-1009), and Anton F Bukwa (Priority 3, Phone (301) 937-0112). At the bottom are "Update" and "Cancel" buttons.

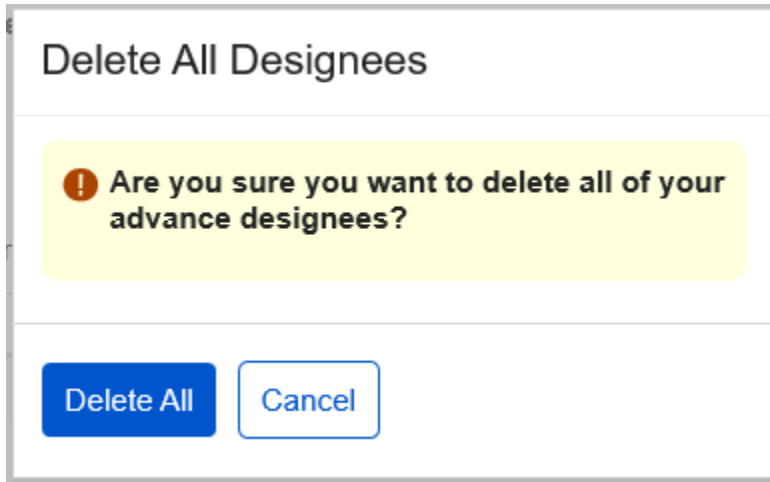
Order of Priority	Name	Phone
1 ▼	Tara Marjorie Lee	(410) 413-5033
2 ▼	Vera Svoboda	(202) 443-1009
3 ▼	Anton F Bukwa	(301) 937-0112

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



The dialog box titled "Delete Tara Marjorie Lee" contains a confirmation message: "Are you sure you want to delete this designee?". At the bottom are "Delete" and "Cancel" buttons.

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



2.4. Search

The SSA technician can search the application from iMain to look up an applicant's/beneficiary's advance designees.

Upon entering a valid SSN, the Search Results displays the applicant's/beneficiary's information.

If the applicant/beneficiary has advance designees on record, the Search Results table displays the "Select" and "Document Contact" action buttons.

Search Results			
SSN	Name	Advance Designees on Record?	Actions
213-88-3029	Vincent Lee	Yes	Select Document Contact

If the applicant/beneficiary does not have advance designees on record, the Search Results table displays only the "Select" action button.

Search Results			
SSN	Name	Advance Designees on Record?	Actions
213-88-3029	Veronika Siffert	No	Select

2.5. Document Contact

An SSA technician can access the Document Contact page from the Search Results page by selecting the “Document Contact” button.

Search Results			
SSN	Name	Advance Designees on Record?	Actions
213-88-3029	Vincent Lee	Yes	Select Document Contact

The SSA technician can document their contact(s) with a designee or beneficiary by selecting the “Document Contact” button within the Contact History. The comments made by when looking to identify a potential representative payees are viewable within the Contact History.

Advance Designation of Representative Payee

Eddie Tech ▾

Document Contact for Vincent Lee

Only initiate contact with advance designees if you need to develop for a representative payee for the beneficiary.

When developing for a representative payee, contact advance designees in the order of priority the beneficiary provided. For more information, refer to [GN 00502.085](#)

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

New Search

Update Designee Information

Contact History

Document Contact

Date	Time	SSA Employee	Comments
04/12/2019	1:56 PM	Doe, J.	[Designee Vera Svoboda] Contacted but could not talk at this time. Was told a suitable time to contact user on 04/14/2019. Will try again on that date.

The sequence of screens below indicates documenting contacts with advance designees.

Document Contact

* Indicates required information

* **Contacted**

--

* **Comments**

Characters remaining: 900

Save **Cancel**

Document Contact

* Indicates required information

* **Contacted**

--

- Designee 1 - Vera Svoboda
- Designee 2 - Tara Marjorie Lee
- Designee 3 - Anton F Bukwa
- Beneficiary - Vincent Lee

* **Comments**

Characters remaining: 900

Save **Cancel**

The “Save” button captures the details of contacting the advance designee under Contact History.

Advance Designation of Representative Payee

Eddie Tech ▾

Document Contact for Vincent Lee

ⓘ Only initiate contact with advance designees if you need to develop for a representative payee for the beneficiary.

When developing for a representative payee, contact advance designees in the order of priority the beneficiary provided. For more information, refer to [GN 00502.085](#)

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

New Search

Update Designee Information

Contact History

Document Contact

Date	Time	SSA Employee	Comments
04/14/2019	11:12 AM	Doe, J.	[Designee Vera Svoboda] Tried to contact again and managed to reach her this time. She was not interested in becoming a rep payee.
04/12/2019	1:56 PM	Doe, J.	[Designee Vera Svoboda] Contacted Designee but she was not able to talk at this time. Left Voicemail and will followup on 04/14/2019.

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.

<i>Name</i>	<i>Product Role</i>	<i>Email</i>	<i>Phone</i>	<i>Specialized Project Knowledge</i>
Dave Bell	UXG Technical Advisor	David.Bell@ssa.gov	(410) 966-4248	
Yulia Wentling	UX Lead	Yulia.Wentling@ssa.gov	(410) 265-4607	
Kai Wong	UX Designer	Christopher.K.Wong@ssa.gov	(410) 265-4690	

SSA will insert the following revised Privacy Act & PRA Statements into the form as soon as possible:

**Privacy Act Statement
Collection and Use of Personal Information**

Section 205(j) of the Social Security Act, as amended, allows us to collect this information. Furnishing us this information is voluntary. However, failing to provide all or part of the information may prevent us from selecting the representative payee(s) you designate to act on your behalf.

We will use the information you provide to update and maintain your representative payee(s). We may also share the information for the following purposes, called routine uses:

- To third party contacts, where necessary, to establish or verify information provided by representative payees or representative payee applicants; and
- To contractors and other Federal Agencies, as necessary, for the purpose of assisting us in the efficient administration of our programs. We will disclose information under this routine use only in situations in which we may enter into a contractual or similar agreement to obtain assistance in accomplishing an SSA function relating to this system or records.

In addition, we may share this information in accordance with the Privacy Act and other Federal laws. For example, where authorized, we may use and disclose this information in computer matching programs, in which our records are compared with other records to establish or verify a person's eligibility for Federal benefit programs and for repayment of incorrect or delinquent debts under these programs.

A list of additional routine uses is available in our Privacy Act System of Records Notice(s) (SORN) 60-0089, entitled Claims Folders System, as published in the Federal Register (FR) on October 31, 2019, at 84 FR 58422. Additional information, and a full listing of all our SORNs, is available on our website at www.ssa.gov/privacy.

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. We estimate that it will take about **6** minutes to read the instructions, gather the facts, and answer the questions. ***Send only comments regarding this burden estimate or any other aspect of this collection, including suggestions for reducing this burden to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.***