Social Security Advisory Board
Minutes
Board Meeting
October 23, 2015

Location:	6401 Security Blvd, Systems Media & Communications Room 2222 Baltimore, MD 21235
Time:	10:00 a.m. – 3:00 p.m.
SSAB Members:	Henry Aaron, Chair
	Lanhee Chen
	Alan Cohen
	Bernadette Franks-Ongoy
	Jagadeesh Gokhale
	Dorcas Hardy
Presenters:	**Kleo Debelius**, Acting Deputy Associate Commissioner, Office of Income Security Programs
	Erik Hansen, Associate Commissioner, Office of Legislation and Congressional Affairs
	Dana Vander Veen, Social Insurance Specialist, Office of Legislation and Congressional Affairs
	John Jankowski, Researcher, Office of Research, Evaluation, and Statistics,
	Ann-Maria Beard, Deputy Director, Office of Income Security Programs
	Angela Hood, Team Leader, Office of Income Security Programs
	Paul Sapia, Social Insurance Specialist, Office of Income Security Programs
	Lisa Rayo, Attorney, Office of General Counsel
	Shirleeta Stanton, Associate Commissioner, Office of Income Security Programs
	Dan Zabronsky, Deputy Associate Commissioner, Office of Quality Improvement
	Rosemary Stricks, Acting Associate Commissioner, Office of Public Service and Operations Support
	Christopher McDermott, Deputy Director, Office of Public Service and Operations Support
	Crystal Lamb, Team Leader, Office of Public Service and Operations Support, Division of Program Policy and Operations

Rafael Moya, Acting Deputy Associate Commissioner, Office of Applications and Supplemental Security Income Systems
Frank Elliott, Division Director, Office of Applications and Supplemental Security Income Systems
Pam Van Der Meulen, Branch Chief, Office of Applications and Supplemental Security Income Systems
Padma Nibhanupudy, Branch Chief, Office of Applications and Supplemental Security Income Systems

SSAB Staff: Claire Green, Staff Director
Jackie Chapin, Policy Chief
Jeremy Elder, Policy Analyst
Joel Feinleib, Staff Economist
Hong Han, Research Analyst
Anita Kelly, Communications Director
Sterling Laudon, Policy Attorney

For the October meeting, the Board held a Representative Payee Symposium at Social Security Administration (SSA) Headquarters. SSA leadership from several components participated in the symposium, presenting on the history of the program, current operations, and systems modernization.

Starting the day, Kleo Debelius from the Office of Income Security Policy (OISP) gave opening remarks, and introduced the representative payee program. Erik Hansen and Dana Vander Veen from the Office of Legislation and Congressional Affairs explained the legislative history of the representative payee program, which launched shortly after the inception of Social Security. John Jankowski from the Office of Research, Evaluation, and Statistics briefed the Board on the demographics of people with representative payees, breaking down the number of beneficiaries by program, age, and type of representative payee. Afterward, Ann-Maria Beard and Angela Hood from OISP explained SSA's process for determining whether a representative payee is needed and how the agency chooses someone for that role. Paul Sapia from OISP and Lisa Rayo from the Office of General Counsel spoke about SSA's process for monitoring representative payees to ensure that funds are accounted for and not misused. Shirleeta Stanton from OISP explained SSA's policies for monitoring representative payees through site visits.

In the afternoon, Rosemary Stricks, Christopher McDermott, and Crystall Lamb, from the Office of Public Service and Operations Support gave an overview of the workload created by the representative payee program. They explained the mechanics of overseeing the representative payee program and discussed the challenges of obtaining and monitoring enough qualified people and organizations to fill these roles.

Rafael Moya, Frank Elliot, Pam Van Der Meulen and Padma Nibhanupduy from Office of Applications and Supplemental Security Income Systems walked through the computer systems used by SSA to oversee the representative payee program. These systems help SSA choose representative payees

and monitor their activities. SSA staff demonstrated the new Representative Payee System they are implementing to replace the older computer program they had in place.

I certify that the minutes written for the October 23, 2015 meeting of the Social Security Advisory Board are correct.

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Henry J. Aaron

Chairman
Social Security Advisory Board