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Roundtable Reexamining Long-Standing SSI Dedicated Account Challenges

November 19, 2020

Virtual Session

The roundtable will build on the Board’s 2019 statement on SSI dedicated accounts to examine the purpose, oversight, administration, and impact of dedicated accounts for recipients, their representative payees, and the Social Security Administration (SSA). It will also explore potential solutions to address long-standing as well as contemporary challenges associated with these accounts.

Agenda

1 – 1:10 pm

Opening Remarks

Kim Hildred, Chair, Social Security Advisory Board (*moderator*)

1:10 – 2:30 pm

Legislative Purpose and Oversight of Dedicated Accounts

During this session, Professor Mary E. O’Connell (Northeastern University School of Law) will give a presentation on the legislative history of dedicated accounts and their challenges as outlined in her law review article, “Supplemental

Security Income's 'Dedicated Account': A Debunked Urban Legend and Twenty Years of Waste.” Then, James J. Klein (Office of Inspector General, SSA) will give a presentation on the Office of Inspector General’s audit and oversight work on dedicated accounts, including its 2019 report “Dedicated Account Underpayments Payable to Children Receiving Supplemental Security Income.”

2:30 – 2:45 pm

Break

2:45 – 4:15 pm

Addressing Old and New Dedicated Account Challenges

During this session, a parent representative payee of a child with a dedicated account will share their experience managing a dedicated account on behalf of their child. Representatives from the National Council of Social Security Management Associations will provide an overview of the workloads the field office handles related to dedicated accounts. Finally, panel members will discuss pre- and post-COVID-19 challenges of administering and managing dedicated accounts and share ideas on different approaches to resolving these long-standing and contemporary challenges.

4:15 – 4:30 pm

Closing Remarks

Nancy Altman, Member, Social Security Advisory Board (*moderator*)

Moderators

Kim Hildred, Chair, Social Security Advisory Board (*moderator*)

Nancy J. Altman, Member, Social Security Advisory Board (*moderator*)

Speakers

James J. Klein, Director, San Francisco Audit Division, Office of the Inspector General, Social Security Administration

David Lescarini, President, National Council of Social Security Management Associations; District Manager, McMinnville, Tennessee Field Office, Social Security Administration

Mary O'Connell, Professor Emerita, Northeastern University School of Law (*retired*)

Parent representative payee of a child with a dedicated account

Panel Members

Jo Anne Barnhart, former Commissioner of Social Security, Social Security Administration (*retired*)

Gregory Brusik, Vice President, National Council of Social Security Management Associations; District Manager, Bellingham, Washington Field Office, Social Security Administration

Taramattie Doucette, Project Director, Children's Disability Project, Greater Boston Legal Services

Rachel Emmons, Washington Representative, National Council of Social Security Management Associations

Linda Landry, Senior Attorney, Disability Law Center – Massachusetts Protection and Advocacy

David Lescarini, President, National Council of Social Security Management Associations; District Manager, McMinnville, Tennessee Field Office, Social Security Administration

Mary O'Connell, Professor Emerita, Northeastern University School of Law (*retired*)

Parent representative payee of a child with a dedicated account

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