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
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