**ELECTRONIC PAYMENT SIGNUP GUIDELINES\* for**

**BENEFIT RECIPIENTS LOCATED IN SKILLED NURSING FACILITIES\*\* (SNF)**

**NEW ADMISSIONS**

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|  | **Scenario** | **Actions** | **Sign-up Procedures** |
| A. | Incoming resident has federal benefit payment deposited electronicallyinto his/her personal bank account, a Representative Payee’s account or a **Direct Express**® Debit Mastercard® card\*\*\* account and resident chooses to make no changes | 1. Private Pay – Private Pay is notified of payment due dates.  2. Medicaid – (Dual Eligible) Responsible Party is notified that SNF portion of the federal benefit should be paid on time  3. Medicare – Private Pay is notified that any coinsurance related to Medicare stay is due privately after service is provided. Dual eligible residents are notified that the federal benefit is kept by the resident unless a patient liability is owed related to coinsurance days. State regulations vary. | N/A |
| B. | Upon admission, if the incoming resident does not have a representative payee he or she can elect~~s~~ to have his/her federal benefit payment deposited electronically into SNF Resident Trust Account (RTA) | If resident is competent to handle financial affairs, resident initiates transfer with the assistance of the SNF (which provides account information for the RTA) | Resident can:   * Go to www.GoDirect.gov or call ***Go Direct*** at 800-333-1795 only if the benefit is received as a paper check * Visit their local Social Security Administration office or call 800-772-1213 * Complete SSA form #1199A or FS form #1200 provided by SNF * Go to [www.SSA.gov](http://www.ssa.gov/) to enroll online |
| C. | Incoming resident’s Representative Payee agrees to have the SNF assume Representative Payee status transferred to SNF. SNF and current representative payee must contact SSA to change payee. SNF must complete a face-to-face interview with SSA to become a representative payee. Federal benefit payment will be deposited electronically into SNF properly titled (according to SSA guidelines) RTA. | SNF works with Representative Payee to transfer Representative Payee status to SNF after SNF and current representative payee contacts SSA to make the payee change. SNF must complete a face-to-face interview with SSA to become a representative payee. SNF files to have the federal benefit deposited into RTA. | SNF must complete a face-to-face interview with SSA to become a representative payee. |
| D. | Incoming resident has a designated Representative Payee who prefers to maintain Representative Payee status and control of resident’s finances | 1. If designated Representative Payee prefers to maintain financial control of resident’s federal benefit, SNF should suggest that the payee contacts SSA  2. A representative payee cannot relinquish their payee duties to the SNF. | Representative Payee can :   * Go to www.GoDirect.gov or call ***Go Direct*** at 800-333-1795 if the benefit is received as a paper check * Visit their local Social Security Administration office or call 800-772-1213 * Complete FS form #1200 provided by SNF |
| E. | Incoming resident is not mentally competent to handle his/her financial affairs and does not have a Representative Payee | SNF completes paperwork with physician certification to become Representative Payee. SSA must make a capability determination for beneficiary before appointing a representative payee. | SNF must complete a face-to-face interview with SSA to become a representative payee. |
| F. | During the SNF stay, the Representative Payee (or other person) misappropriates the resident’s federal benefit payment | By law, the SNF must contact the local SSA Office and report the misappropriation | SNF must complete a face-to-face interview to become the representative payee. |

\* These guidelines are based on Social Security Administration (SSA and SSI) benefits; for information on becoming a Representative Payee for other benefits, contact the agency directly.

\*\* For consistency, this document uses the term “Skilled Nursing Facility” to refer to facilities that are recognized by both Medicare and Medicaid as either a skilled nursing facility or nursing facility.  
\*\*\* It is recommended that prepaid cards NOT be used to receive federal benefit payments for residents of skilled nursing facilities.

For more information, please to go to the American Healthcare Association website at www.ahcancal.org