

## Changes to Social Security and other Federal Benefit Payments: Issues for Assisted Living Facilities

On March 1, 2013, the U.S. Department of the Treasury will begin requiring beneficiaries to receive Social Security and other federal benefit payments electronically. As this deadline approaches, assisted living and other long term care providers are encouraged to educate residents, families, and residents' authorized representatives receiving paper checks to make the switch to electronic payment.

The December 2010 Treasury rule mandating the payment transition affects:

- ***Current check recipients.*** People already receiving Social Security and other federal benefits by check are required to switch to direct deposit by **March 1, 2013**.
- ***People newly applying for benefits.*** Anyone applying for federal benefits thereafter will receive their payments electronically from day one.

There are exceptions:

- ***People born before May 1, 1921*** can continue to receive their payments by check if they choose.
- ***Limited hardship waivers*** are available for people in unique circumstances.

Federal agencies and benefits impacted include:

- Social Security Administration (Social Security and SSI)
- Veterans Affairs (VA benefits)
- Railroad Retirement Board
- Office of Personnel Management
- Department of Labor (Black Lung)

## Current Assisted Living Facility Practices and Payment Options

Many assisted living residents, their families, and other persons authorized to handle resident funds already receive federal benefit payments electronically in bank accounts from which they make payments to assisted living providers. Some still receive paper checks. Assisted living facilities also can receive federal benefit payments on behalf of residents as representative payees.

Treasury officials suggest that assisted living facilities and other long term care providers encourage and/or assist federal benefit recipients receiving benefits through paper checks to convert by March 1, 2013. It's recommended that all current residents convert by early January, if possible, to allow for processing time. Facility residents that newly apply for federal benefits will receive payments electronically from day one after the March deadline.

## What Providers Can Do

Providers can review the payment status of current residents and determine who receives a paper federal benefit check. The Treasury also encourages providers to:

- Create a plan to convert current residents by early January 2013, so payments are electronic by March 1, 2013.
- Ensure forms are current.
- Call **Go Direct** to convert up to 10 residents per call or go to an SSA office to do so.
- Review and adjust admissions policies and procedures as needed.

## How To Convert to Direct Deposit or Electronic Fund Transfer

- **PHONE** — Call 1-800-333-1795, or
- **ON-LINE** — Go to [www.GoDirect.org](http://www.GoDirect.org), or
- **PAPER** — Fill out and mail in paper form (FMS 1200), found on [www.GoDirect.org](http://www.GoDirect.org)

*NOTE: Forms SSA-1199A, SSA-11-BK,  
SSA-787 are available from SSA*

# How to Convert to Electronic Fund Transfer

[www.GoDirect.org](http://www.GoDirect.org)

GO DIRECT

Text Size Zoom A A A

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## Getting Checks?

Are you getting Social Security, VA or other federal benefits by paper check? You are required by the U.S. Department of the Treasury to switch to electronic payments by March 1, 2013.

Get direct deposit NOW!  
Get the Direct Express® card NOW!

Learn More ▶

### The Countdown Is On

Save taxpayers \$1 billion

Switch today ▶

350 : 11 : 19 : 47  
days hours minutes seconds

#### U.S. Treasury Requiring Electronic Federal Benefit Payments

The Treasury Department is phasing out paper check payments and requiring federal benefit recipients to get their money electronically. You can choose to get your payments by **direct deposit** to a bank or credit union

#### Welcome!

Treasurer of the United States Rosie Rios shares important news about federal benefit payments

**Sign-Up Form for Direct Deposit of Federal Benefit Payments**

OMB No. 1510-0007

You may also sign up online today at [www.GoDirect.org](http://www.GoDirect.org) or call **Go Direct** toll free at 1 (800) 333-1795 (for social security, railroad retirement board, civil (non-military) retirement payments or VA only).

**DIRECTIONS**

Please read the information on page 2 before completing this form. You must complete boxes A, B, C, D, E and F. Only complete this form to sign up for direct deposit if you are an individual, or a representative payee of an individual, who receives checks for the following types of federal benefits: social security, supplemental security income, railroad retirement, civil (non-military) retirement, or VA (compensation or pension only). If you currently receive your payment by direct deposit you may not use this form. Please refer to page 2 for further instructions.

**A. FEDERAL BENEFIT RECIPIENT INFORMATION**  
(Print name(s) and address exactly as they appear on your benefit check)

NAME OF PERSON(S) TO WHOM BENEFIT BEING PAID  
LAST FIRST MIDDLE  
ADDRESS (Street, P.O. Box, apartment number)  
CITY OR TOWNSHIP STATE ZIP CODE  
COUNTRY TELEPHONE NUMBER  
SOCIAL SECURITY NUMBER (OPTIONAL) BENEFIT TO GOVERNMENT BENEFIT (OPTIONAL)

**B. BANK OR CREDIT UNION INFORMATION**  
(Print name(s) and address exactly as they appear on your benefit check)

ACCOUNT TYPE  
Checking Savings  
\*ACCOUNT NUMBER (see sample check below; do not include check number)  
\*ROUTING NUMBER (see sample check below; do not include check number)  
\*ACCOUNT NUMBER (see sample check below; do not include check number)  
\*CHECK NUMBER (see sample check below; do not include check number)

**C. TYPE OF PAYMENT (check only one)** You must complete a separate form for each type of federal payment.

☐ SOCIAL SECURITY ☐ SUPPLEMENTAL SECURITY INCOME ☐ VA (COMPENSATION ONLY)  
For military, federal salary, veterans benefits or other federal payments not available through Go Direct, please contact the paying agency (see page 2 for a partial list of paying agencies).

☐ RAILROAD RETIREMENT (compensation) ☐ CIVIL (NON-MILITARY) RETIREMENT (compensation)  
Annuity Unemployment benefits Railroad retirement Social Security

**D. IDENTIFICATION**

CLAIM NUMBER OR CHECK NUMBER (YOUR MOST RECENT PAYMENT)

**E. PAYMENT VERIFICATION**

You must also enter the amount of your last benefit payment.  
AMOUNT OF YOUR MOST RECENT PAYMENT \$

**F. CERTIFICATION**

I certify that I am entitled to receive the payment identified above, and that I have read and understood the back of this form. In signing this form, I authorize this payment to be sent to the direct deposit location listed in Part B above, to be deposited into the account above.

SIGNATURE DATE

**FOR JOINT ACCOUNT HOLDERS**

I certify that I have read the SPECIAL NOTICE TO JOINT ACCOUNT HOLDERS on the back of this form.

SIGNATURE DATE

**Be sure to complete all sections of this form. Otherwise, the form cannot be processed. Return the completed form to:**

Go Direct Processing Center  
U.S. Department of the Treasury  
P.O. Box 659527  
Dallas, TX 75265-9527

This form is only to be used for switching from check payments to direct deposit of certain federal benefits listed in Box C. Use of this form for any other purposes will result in the form being rejected.

Contact your paying agency to:

- Update your name or address
- Change your account information if you already receive your payment by direct deposit, or
- Sign up for direct deposit for military, federal salary, veterans benefits, or other federal payments not processed by Go Direct.

Call 1 (800) 333-1795

## **Social Security, Supplemental Security Income, Veterans, Railroad Retirement or Civil Service (OPM) Benefits**

Download, print, and complete the FMS Form 1200 to enroll in direct deposit.

Mail the completed form to:

U.S. Treasury

Electronic Payment Solution Center

PO Box 650527

Dallas, TX 75265-0527

## **Military Benefits**

These are not processed by the U.S. Treasury Electronic Payment Solution Center. Contact DFAS/Military Customer Service at **1-888-332-7411** or visit [www.dfas.mil](http://www.dfas.mil).

## **Black Lung**

These are not processed by U.S. Treasury Electronic Payment Solution Center. Contact the Department of Labor. A toll-free number has been designated for each of the nine Division of Coal Mine Workers' Compensation district offices. Visit the Department of Labor web site for a list of district offices and their phone numbers.

## **Delivery of Payments to a Prepaid Debit Card**

For beneficiaries who do not have a bank or credit union account, Treasury offers the option of receiving payments through a Direct Express® Debit MasterCard® account.

For further information, contact Matt Helfrich, U.S. Department of the Treasury, at 215-516-8022.