

TIPS AND BEST PRACTICES FOR APPOINTED REPRESENTATIVES



Securing today
and tomorrow

REGISTRATION FOR DIRECT PAYMENT OF FEES

- Register for direct payment of fees and eFolder access online at **Appointed Representative Services**.
 - » Submit a form SSA-1699 Registration for Appointed Representative Services and Direct Payment to register and receive a representative identification (RepID).
 - » Fax your registration to **1-877-268-3827**. This number is dedicated for SSA-1699 submissions and should not be used for other forms/documents.
 - » Register to gain access to eFolder, even if you do not seek direct payment (*In order to enroll for eFolder access, due to authentication requirements, you must have been appointed on at least one claim pending at the hearing level*).
- Submit changes to your mailing address, bank information, or affiliations using form SSA-1699 via fax to **1-877-268-3827**.
- If you are an Eligible for Direct Payment Non-Attorney (EDPNA) or interested in the process, please visit our EDPNA webpage at **Representing SSA Claimants – Direct Payment to Eligible Non-Attorney Representatives** regularly for news updates and requirements. Update us on any changes to your status, including becoming an attorney by submitting an updated form SSA-1699 as instructed above.
- Call **1-866-691-3061** if your **Appointed Representative Services** account is suspended.

APPOINTMENT OF REPRESENTATIVE

- Use available Online Services, whenever possible:
 - » For information related to representation and to subscribe for email updates, visit: **Representing SSA Claimants**.
 - » To submit your appointment online: **e1696**.
 - » To locate available standard agency forms: **Forms**.
 - » To upload your claim related documents online: **Electronic Records Express**.
 - » To gain access to clients' electronic cases: **Appointed Representative Services**.
- Submit one form SSA-1696 or other written notice of appointment for each representative (*We must collect information unique to each representative*).

- » Once the appointment has been processed in our system, you and the claimant will receive a confirmation notice.
- Wait 30 days before contacting your client's servicing SSA field office or workload support unit (WSU) to follow up on a submitted SSA-1696 unless you have an urgent need. You can find the servicing field office's telephone number using the **Social Security Office Locator**. Disability Determination Service (DDS) offices do not process SSA-1696s and should not be contacted for form SSA-1696 follow-up.
 - » If you experience difficulty with contacting the servicing office or have not received any response, please contact the respective **Regional Communications Director**.
- Do not duplicate your submissions. Duplicate submissions cause delays as the agency must review each submission.
- If you verify the form SSA-1696 is in the claimant's electronic folder, but you are not receiving copies of notices sent to your client, contact the servicing field office/WSU to confirm that your appointment information is up to date.
- Ensure that the principal representative is clearly identified in a multiple representative situation.
- If you are not registered for Appointed Representative Services (ARS), you can use your own e-fax solution or a physical fax machine to send documents to the specific hearing office's designated email inbox. To submit documents electronically by fax, use the toll-free fax number with area code "833" assigned to the servicing hearing office, available at **Hearings and Appeals**.
 - » To register for ARS: **Appointed Representative Services**.
 - » To locate the servicing Hearing Office, please refer to: **Hearing Office Locator**.
- Review the **Best Practices for Claimants' Representatives** website for comprehensive information on representation during the adjudicative process.
- File a written notice of appointment only if there is an issue pending before SSA (e.g., SSA has received a validly signed application from the claimant). If you are seeking disclosure of information about a client but do not want to be appointed as a representative, submit form **SSA-3288 Consent for Release of Information**.

FEES – Agreements, Petitions, and Payments

FEE AGREEMENTS

- Use the **e1693 to submit your fee agreement online** or the agency standard form **SSA-1693** (Fee Agreement for Representation Before the SSA) when possible, for streamlined processing.
- For independently drafted fee agreements, ensure the fee agreement meets the statutory conditions for fee agreement approval as outlined in **GN 03940.003**.
- Ensure all appointed representatives who have not waived their fees (regardless of whether they are employed in the same entity or different entities) sign the **same** fee agreement.
- Submit the fee agreement as early as possible in the process. Fee agreements **must** be received prior to the first favorable determination or decision made on the claim.

FEE PETITIONS

- Use the agency standard form **SSA-1560** Petition for Authorization to Charge and Collect a Fee for Services Before the SSA when possible, for streamlined processing.
- Submit your fee petition as soon as all services have been completed if you are not seeking approval using the fee agreement process, or your request for a fee was denied through the fee agreement process. You do not need to wait for the notice of award, especially if you are petitioning for fees after withdrawal of representation.
- Clearly document your service hours and work on your fee petition. Make sure you sign the petition document.
- Send a copy of the submitted fee petition document to the claimant.
- For representatives requesting direct payment, ensure you file your fee petition (or intent to file a fee petition) within 60 days of the first favorable determination or decision made on the claim. (*Fee petitions received after this timeframe may not be eligible for direct payment.*) Complete all SSA forms in their entirety. Missing information often causes delays.

FEE PAYMENTS

- Keep your information (e.g., *mailing address, bank information, affiliations*) up to date using the SSA-1699 process.

- Use Section 5 of the form SSA-1696 to update your direct payment information. (Note that form SSA-1695 is obsolete.)
- Wait until you receive the notice of award before contacting us about the status of fee payments. Premature inquiries slow down the processing of payments. Fee payments are made after entitlement awards are processed, which is indicated by the notice of award.
- Contact the **Representative Call Center (RCC)** at **1-877-626-6363** for issues involving an issued IRS form 1099-MISC or 1099-NEC.
- For fee payment issues, contact the **Processing Center (PC)**:
 - » **Representing Social Security Claimants-Processing Center Telephone Contact Information for Claimants Under Age 54**
 - » **Representing Social Security Claimants-Processing Center Telephone Contact Information for Claimants Age 54 and Older**
- Use form **SSA-1696-SUP2** to withdraw an appointment and to indicate whether you are waiving a fee or will file a fee petition.
- Familiarize yourself with our policy in **GN 03920.017** on Payment of Representative's Fees, and **GN 03920.050** on Releasing Withheld Funds for Representative Fees.