



Registration Requirements for Direct Payments to Representatives

Appointed representatives who want Social Security to pay their authorized fee directly from a claimant's past-due benefits must meet several requirements. These requirements apply to:

- Attorneys who represent claimants before Social Security or the federal courts, and who want to receive direct payments.
- Non-attorneys who meet certain prerequisites (including eligible for direct payment non-attorneys, or EDPNAs), and who want to receive direct payments.

While registration is not required for non-attorneys who do not qualify for direct payment, we encourage all representatives to register. Registration is free, fast, and convenient, and can allow representatives access to the electronic claim file (eFolder). This can save time and money.

Important forms

There are three important forms involved in direct payment:

- Form SSA-1699, *Request for Appointed Representative Services and Direct Payment*. Representatives appointed by the claimants must complete and submit this form to receive direct payment. This is a one-time submission. However, representatives must submit an updated form when their personal, professional, or business affiliation information changes. We collect the information to issue notices and fee payments.
- Form SSA-1696, *Claimant's Appointment of a Representative*. Representatives who wish to receive direct payment must complete Section 5 Affiliation Information of the form to provide case-specific information necessary for direct payment. Representatives who simply update this information only need to complete this section.

- Form SSA-1694, *Request for Business Entity Taxpayer Information*. A representative who is working for an organization, firm, or other business entity should complete this form to register the entity with Social Security. We do not require entity registration on this form. However, by providing the entity's name, employer identification and address, we are able to issue the Internal Revenue Service's (IRS) Form 1099-NEC to the affiliated business for fees paid to the entity's employees.

Complying with the law

The one-time submission of Form SSA-1699 is the first step of the two-step registration process that representatives must complete to receive direct payments for specific claims.

In the second step, representatives give us case-specific information in Section 5 (Affiliation Information) of the SSA-1696. Representatives must follow this step for each case they represent at the administrative or court level and if they wish to receive a fee. We use the information to connect the claim with the appointed representative. This ensures that we correctly pay the representative for each claim and capture the payments to report them correctly on Form IRS1099.

We collect this information to conform to requirements set by the Internal Revenue Code.

Payments count as taxable income to these entities. If we have the business entity's taxpayer information, we will issue to both the representative and the entity the appropriate form with the correct income.

If the entity is not registered, we'll report the taxable income to the representative. Accurate reporting of the income and correctly issued tax forms helps avoid such problems as the risk of failing to report income to the IRS. We recommend that all business entities register and affiliate with the individual representatives early on.

Why we need your Social Security number

The Debt Collection and Improvement Act (DCIA), requires those doing business with a federal agency to provide their taxpayer identification number (TIN). For most individuals, their Social Security number is their TIN. The DCIA requires federal agencies to include a TIN on each certified voucher sent for payment. When we directly pay a representative, we must include the representative's TIN (in most cases the SSN) on the payment voucher to the Department of the Treasury.

Representatives must provide their TIN before we can pay an administrative or a court awarded fee.

Where to find and send forms

Our forms are available online. Representatives can access "Representing Social Security Claimants" at www.ssa.gov/representation then select the link "**Forms Frequently used by Representatives.**" They can print out a form, complete, and mail it to a local office.

For faster service, representatives can fax the paper SSA-1699 to **1-877-268-3827**. They can file the SSA-1696 electronically through the e1696 portal found at the top left corner of the representation page. Alternatively, they can fill out and fax the paper SSA-1696 electronically (eFax) to the dedicated number for the claimant's servicing local office by accessing www.ssa.gov/locator. Lastly, registered representatives can upload the form to our systems through Electronic Records Express (ERE), Appointed Representative Services (ARS) or the iAppeals portals.

Business entities can complete and submit the SSA-1694 electronically.

NOTE: Do *not* submit these forms to a hearing office or to the Office of Appellate Operations (Appeals Council). Doing so could inadvertently disclose taxpayer information and could delay processing.

For more information

To find details about the registration requirements, as well as other helpful information, see "Representing Social Security Claimants" at www.ssa.gov/representation. You may also call our toll-free help line for assistance at **1-800-772-6270**. If you are hearing impaired call our TTY number at **1-800-325-0778**.



Securing today
and tomorrow