

# 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**.
  - » File an SSA-1699 Registration for Appointed Representative Services and Direct Payment to register and receive a representative identification (RepID).
  - » Fax your registration to the dedicated number at **1-877-268-3827**.
  - » Register to gain access to eFolder, even if you do not seek direct payment (*Before you register, you must have or had at least one claim pending at the hearing level due to authentication requirements*).
- Submit changes of 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), inform us about your status changes, if you become an attorney, or wish to receive direct payment of fees.
- 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 **[www.ssa.gov/representation](http://www.ssa.gov/representation)**
  - » To submit your appointment online: **e1696**
  - » To locate available standard agency forms: **[www.ssa.gov/forms](http://www.ssa.gov/forms)**
  - » To upload/view your documents online: **[www.ssa.gov/ere](http://www.ssa.gov/ere)**
  - » To gain access to clients' electronic cases: **[www.ssa.gov/representation](http://www.ssa.gov/representation)**
- Submit one form SSA-1696 for each representative (*We must collect information unique to each representative*).
- Wait 30 days before contacting by phone 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 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 can cause delays as the agency must review each submission.
- Contact the servicing field office/WSU if you verify the SSA-1696 is in the claimant's electronic folder, but you are not receiving copies of notices sent to your client to confirm that your appointment information is up to date.
- Ensure that the principal representative is clearly identified in a multiple representative situation.
- Submit a notice of appointment, if you are a new representative on the case or if the record does not include an SSA-1696 or other notice of your representation.
- 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 via fax, use the toll-free fax number with area code "833" assigned to the servicing hearing office, available at [https://www.ssa.gov/appeals/ho\\_locator.html](https://www.ssa.gov/appeals/ho_locator.html).
  - » To register for ARS: **Appointed Representative Services | Office of Hearings Operations (ssa.gov)**.
  - » To locate the servicing Hearing Office, please refer to [https://www.ssa.gov/appeals/ho\\_locator.html](https://www.ssa.gov/appeals/ho_locator.html)
- Review the **Best Practices for Claimants' Representatives** publication 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 are not actively seeking representation, 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 on 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 made on the claim (i.e., the date on the notice of award).

## 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 submission as soon all services have been completed and you are not seeking approval via 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 made on the claim (i.e., the date on the Notice of Award). (*Fee petitions received after this timeframe may not be eligible for direct payment.*) Complete all SSA forms in their entirety. Missing information often triggers delays.

## FEE PAYMENTS

- Keep your information (e.g., *mailing address, bank information, affiliations*) up to date via the SSA-1699 process.
- Use Section 5 of the SSA-1696 to update your direct payment information. (Note that Form SSA-1695 is obsolete.)

- 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 **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** and **GN 03920.050** on Releasing Withheld Funds for Representative Fees.