People Helping Others

• We strive to provide easy and convenient information about our benefits and our application process. We are also here when you help others with assistance and support. The People Helping Others page was created to help you assist a family member, a friend, or vulnerable clients during their time of need. www.ssa.gov/thirdparty/
People Helping Others

This training supplements information found on the People Helping Others page. We will review:

- Disability and SSI Application Process
- Special Consideration Cases
- Medical Forms
- Online Services

Disability Programs

The Social Security and Supplemental Security Income disability programs are the largest of several Federal programs that provide assistance to people with disabilities. While these two programs are different in many ways, both are administered by the Social Security Administration and only individuals who have a disability and meet medical criteria may qualify for benefits under either program.

Disability Rules for an Adult (Over Age 18) Both Social Security and SSI

- Must have a physical or mental impairment (or combination of conditions)
- Disability must be expected to last 12 consecutive months or result in death
- We consider age, education, and past work activity
- Inability to perform substantial work activity (SGA, 2021): Disability ($1,310 a month); Blind ($2,190 a month)
“Substantial gainful activity” (SGA) is a term used to describe a level of work activity and earnings. We generally use earnings guidelines to evaluate whether your work activity is SGA.

If the impairment is anything other than blindness, earnings in 2021 averaging over $1,310 a month generally demonstrate SGA.

The SGA amount in 2021 for blind individuals is $2,190.

SSI only uses SGA as a measure of work during initial claims.

SSDI uses SGA throughout the life of the claim.

Apply as soon as your client becomes disabled.

Processing an application for disability benefits can take three to five months.

We may be able to process the application faster if you help us by getting any other information we need.
Documents Needed When Applying for Disability Benefits

- Social Security number(s) for client, spouse, & children
- W-2 or self-employment tax forms
- Military records (DD-214)
- Bank information for Direct Deposit
- Information about doctors, hospitals, clinics, and medical tests
- Names of current medications
- Information regarding work history for the last 5 years

Application and Referral Process
Potential Applicants

• Identify adult/child who may have a serious physical or mental impairment and is severe enough to keep them from working.
• Information shared in this training will help you in identifying potential programs and special considerations that may apply.
• Electronic filing of the iClaim is preferred.

SSA Pre-Screening

• Your application will be reviewed to determine if the applicant is currently receiving SSI/SSDI benefits.
• The date the faxed/mailed forms are received will be considered as protective filing for the application.
• Electronic filing of the iClaim is preferred.

SSA Pre-Screening

• Submission of online Disability claims (iDIB) is only considered to be complete when the applicant is present to click and sign.
• We will review the Disability Checklist to make sure all items have been received, completed, and signed by the applicant.
• We will evaluate any current work activities (SGA).
SSA Pre-Screening

- **Wet Signature** required by applicant when third party involved.
- The “Sign Now” button represents applicant’s acceptance of the penalty of perjury statement and acts as their legal signature.
- Form Attestation
- Witnessed Signature

Medical vs non-Medical Review

Two Appeal Types

Claimants or their representative can submit an appeal online for a **medical or non-medical** decision at the reconsideration, hearing, and Appeals Council levels.

Non-medical examples:
- Income and/or resources
- Living arrangements
- Overpayments
- Must have 20 credits (equivalent to 5 out of the last 10 years) before becoming disabled
What Happens Next?

If the claimant is not performing SGA, we will forward the case to the Disability Determination Services (DDS) office in your state. DDSs are State agencies responsible for developing medical evidence and making the initial determination of whether or not a claimant is disabled under the law.

Pre-Screening

SSDI? SSI? Working SGA? All forms received?

Initial Claim

Referred to DDS

Approval = FO
Denial = 60 days to appeal

Reconsideration

Referred to DDS

Approval = FO
Denial = 60 days to appeal

Hearing

Referred to OHO

Approval = FO/PSC
Denial = 60 days to appeal

Appeals Council

Approval = FO/PSC
Final Appeal Level

The Life of a Disability Application

Initial Determination

Once a claim reaches the DDS, the disability examiner (DE) reviews the claim, requests evidence, and schedules follow-ups.

- Consultative Examination (if necessary) for evaluation purposes only; not for treatment
- Determinations –
  - To FO for further development,
  - Favorable, or
  - Unfavorable
Reconsideration
- First level of appeal in the claims process
- File within 60 days of the initial denial date
- Consultative Examination (possible)
- Request new medical documents (if stated in appeal documentation)
- Determination:
  - Favorable or
  - Unfavorable

ALJ Hearing
- Second level of appeal process
- File within 60 days of the reconsideration denial date
- May call and question witnesses
- Request new medical documents (if stated in appeal documentation)
- Determination:
  - Favorable or
  - Unfavorable

Appeals Council Review
- Third level of appeal process
- File within 60 days of the reconsideration denial date
- May call and question witnesses
- Request new medical documents (if stated in appeal documentation)
- Testimony is taken under oath or affirmation
SSDI vs SSI

Alleged Onset Dates

- The Alleged Onset Date is the date the applicant alleges his/her disability became severe enough to prevent him/her from working at SGA level.
- Please make sure the alleged onset date is the same throughout the applications – SSA-16, SSA-8000, and SSA-3368.
- The alleged onset date must have a month, date, and year.
- SGA can be affected by subsidies, IRWEs, and unsuccessful work attempts.

SSDI vs SSI

<table>
<thead>
<tr>
<th>Social Security Disability Insurance</th>
<th>Supplemental Security Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments come from the Social Security trust funds and are based on a person’s earnings.</td>
<td>Payments come from the general treasury fund, NOT SSA trust funds. SSI payments are not based on a person’s earnings.</td>
</tr>
<tr>
<td>An insurance that workers earn by paying Social Security taxes on their wages.</td>
<td>A needs-based public assistance program that does not require a person to have work history.</td>
</tr>
<tr>
<td>Pays benefits to disabled individuals who are unable to work, regardless of their income and resources.</td>
<td>Pays disabled individuals who are unable to work AND have limited income and resources.</td>
</tr>
<tr>
<td>Benefits for workers and for adults disabled since childhood. Must meet insured status requirements.</td>
<td>Benefits for children and adults in financial need. Must have limited income and limited resources.</td>
</tr>
</tbody>
</table>

SocialSecurity.gov
Social Security Disability Insurance (SSDI)

Who Can Get Disability Benefits?

- Must have earned 20 credits (equivalent to 5 years of work) over the last 10 years before becoming disabled
- For workers under age 31, less work is required
- Unlike retirement benefits, you could lose your eligibility for disability coverage if you stop paying into the program.

How Do You Qualify for Disability Benefits?

- Must have paid into Social Security five out of the last 10 years
- For workers under age 31 less work is required
  - Must have paid Social Security taxes for half the time since age 21

  Example:  Age 24  Paid Social Security Taxes 1 ½ years  
            Age 29  Paid Social Security Taxes 4 years

Who Can Get Disability Benefits?

- Child: Can receive benefit if not married and under age 18 (or under age 19 if still in high school).
- Disabled Child: Can receive benefits beyond age 18 if not married and was disabled before age 22.
- Spouse: Can get full benefits at full retirement age — or reduced benefits at age 62 — or at any age if caring for child under 16 or a disabled child.
**SSDI: Benefits for the Family**

**Spouse**
- At age 62
- At any age if caring for child who is under 16 or disabled
- Divorced spouses may qualify

**Child**
- Not married under age 18 (under 19 if still in high school)
- Not married and disabled before age 22

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**SSI Benefits for Adults**

**Resource limits:**
- $2,000 for individual
- $3,000 for couple

We count the value of:
- Bank accounts (CDs, IRAs)
- More than primary automobile
- Stocks and bonds, 401KLs
- Liquid assets
- Proper other than where you live

---

**SSI Benefits for Adults, cont.**

We don’t count as resources
- Home in which you live
- Primary automobile
- Burial plots
- Certain resources set aside for personal burial expenses
SSI Benefits for Children

• SSI pays benefits to disabled children living in household with limited income and resources.
• We count the income and resources of the child’s parent(s) in addition to the disabled child’s personal income.

Resource limits:
• $4,000 if living with 1 parent
• $5,000 if living with 2 parents
• $2,000 if not living with either parent, but with another guardian/care taker.

We count the value of:
• Bank accounts (CDs & IRAs)
• More than 1 primary automobile
• Stocks and bonds, 401Ks
• Liquid assets
• Property other than the residence where you live
When the Child Attains Age 18

- We no longer count the income and resources of the child’s parent(s) for eligibility purposes.
- If the child continues to live with parent(s), but does not pay for food and shelter expenses, a lower SSI payment may apply.
- SSA will conduct a new disability determination using the adult rules for all 18 year olds.

Income can change your payment

- Earned Income: wages and self-employment
- Unearned Income: All income that is not earned
- In-Kind Income: Value of food and/or shelter
- Deemed Income: Part of the income from a spouse or parent

SSI Benefit Rates

<table>
<thead>
<tr>
<th></th>
<th>Effective January 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td>$794 a month</td>
</tr>
<tr>
<td>Couple</td>
<td>$1,191 a month</td>
</tr>
</tbody>
</table>
### Income

<table>
<thead>
<tr>
<th>Earned</th>
<th>Unearned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wages</td>
<td>SSA benefits</td>
</tr>
<tr>
<td>Net earnings from self-employment</td>
<td>Veterans benefits</td>
</tr>
<tr>
<td>Payment for services in sheltered workshop</td>
<td>Unemployment benefits</td>
</tr>
<tr>
<td>Interests</td>
<td></td>
</tr>
<tr>
<td>Pensions</td>
<td></td>
</tr>
<tr>
<td>Cash from family/friends</td>
<td></td>
</tr>
</tbody>
</table>

### Income Exclusion

**Exclusions Include**

- The first $20 a month of most income received
- The first $65 a month earned from work and half the amount over $65
- The value of food stamps
- Most home energy assistance
- Certain exclusion on Indian Trust Fund payments
- One-third of child support received monthly

### Resources

<table>
<thead>
<tr>
<th>Included Resources</th>
<th>Excluded Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bank Accounts (CDs, IRAs)</td>
<td>Home in which you live</td>
</tr>
<tr>
<td>Stocks, Bonds, 401Ks (Liquid Assets)</td>
<td>First car</td>
</tr>
<tr>
<td>Second Car</td>
<td>Burial plots for self &amp; family</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>Some resources set aside for burial</td>
</tr>
<tr>
<td>Property other than where you live</td>
<td></td>
</tr>
</tbody>
</table>

- Individual Limit: $2,000 / Couples Limit: $3,000
Living Arrangements

Living arrangements are another factor to determine how much SSI a person can get. Benefits may vary depending on where you live:

- In someone else’s household
- In an institution – generally $30/month maximum
- In a group care or board and care facility

Achieving a Better Life Expectancy (ABLE) Act

ABLE accounts are tax-advantaged savings accounts (similar to a 529 College Savings Account) for qualified individuals with disabilities and their families.

- The beneficiary of the ABLE account is the account holder.
- A person with a disability who receives SSI may save up to $100,00 and retain eligibility for SSI.

ABLE (Achieving a Better Life Experience) Act

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- The beneficiary of the ABLE account is the account holder.
- A person with a disability who receives SSI may save up to $100,00 and retain eligibility for SSI.
ABLE (Achieving a Better Life Experience) Act

- Signed into law in 2014.
- ABLE accounts are excluded from resources in whole, or in part, for purposes of certain means-tested federal programs.
- Limits eligibility to individuals who became disabled before turning 26.
- Accounts must be administered by a qualified ABLE program which is available in most states.

ABLE Qualifying Expenses

- Education
- Housing
- Transportation
- Employment training and support
- Assistive technology
- Personal support services
- Healthcare
- Legal fees
- Financial management
- Administrative services

Special Consideration
Priority Cases are those identified for priority handling, developed and processed expeditiously. These include:

- Homeless Cases
- Terminal Illness (TERI) Cases
- Compassionate Allowance (CAL) Cases
- Wounded Warrior / 100% P&T cases
- Presumptive Disability or Blindness (PD/PB)

We flag the disability folder to alert SSA and DDS components to special case processing and development requirements for homeless cases. An applicant is homeless if he or she does not have a fixed, regular, and adequate nighttime residence. We also consider applicants homeless if they expect to lose current accommodations within 14 days, and will not have a fixed, regular, and adequate nighttime residence.

Examples:
- Someone who sleeps in doorways, overnight shelters, parks, bus stations, etc; or
- A person who stays with a succession of friends or relatives and has no permanent living arrangement on the first moment of the month.
Homelessness

- May be:
  - Participating in a program that primarily assists the homeless;
  - Fleeing domestic violence;
  - Runaway or abandoned youth; and
  - Young adults aging out of foster care

TERI Cases

SSA defines terminal illness as “a medical condition that is untreatable and expected to result in death.”

- We make every effort to identify a potential TERI case as early as possible.
- TERI case flags
- Expedited processing

TERI Case Descriptors

We identify potential TERI cases either directly through the claimant’s allegations or indirectly through TERI case descriptors:

- An allegation from the claimant or third party that the illness is terminal.
- An allegation or diagnosis of ALS (Lou Gehrig’s Disease).
- An allegation or diagnosis of AIDS.

secure.ssa.gov/apps10/poms.nsf/lnx/0423020045

DI 23020.045 Terminal Illness (TERI) Case

SocialSecurity.gov
TERI Case Descriptors (cont.)

- Receiving inpatient or in-home hospice (end-of-life) care.
- Awaiting heart, lung, liver, or bone marrow transplant (excludes kidney and corneal transplants).
- Chronic Pulmonary or heart failure requiring continuous home oxygen and an inability to care for personal needs.
- Comatose for 30 days or more
- Newborn with a lethal genetic or congenital defect

DI 23020.045 Terminal Illness (TERI) Case
secure.ssa.gov/apps10/poms.nsf/lnx/0423020045

TERI Case Descriptors (cont.)

- Any malignant neoplasm (cancer) which is:
  - Metastatic (has spread)
  - Defined as Stage IV
  - Persistent or recurrent following initial therapy
  - Inoperable or unresectable

DI 23020.045 Terminal Illness (TERI) Case
secure.ssa.gov/apps10/poms.nsf/lnx/0423020045

TERI Case Descriptors (cont.)

- Any allegation or diagnosis of:
  - Cancer of the brain, esophagus, liver, pancreas, gallbladder
  - Mesothelioma
  - Small Cell or Oat Cell lung cancer
  - Acute myelogenous leukemia (AML) or acute lymphocytic leukemia (ALL)

DI 23020.045 Terminal Illness (TERI) Case
secure.ssa.gov/apps10/poms.nsf/lnx/0423020045
Compassionate Allowances (CAL) and Quick Disability Determinations (QDD)

- Our two fast-track processes, CAL and QDD identify claimants with impairments that significantly affect their ability to function and allow us to expedite our determinations on those cases.
- The SSA field office employees do not select CAL and QDD cases.
- They are determined by a CAL/QDD selection software.

Compassionate Allowances (CAL)

- A way of quickly identifying diseases and other medical conditions that invariably qualify under the Listing of Impairments based on minimal objective medical information.
- Allows Social Security to target the most obviously disabled individuals for allowances based on objective medical information that we can obtain quickly.
- Is not a separate program from the Social Security Disability Insurance or Supplemental Security Income programs.

Wounded Warriors & Veterans

Wounded warriors and veterans with 100% Permanent & Total disability ratings from the VA may be able to get expedited medical decisions on SSDI and SSI applications.
**VA 100% Permanent and Total Disability Rating**

- Expedited processing for veterans that meet the VA 100% Permanent and Total disability compensation rating.
- Please provide letter with 100% P&T rating at the time of filing.
- A VA compensation rating of 100% P&T does not guarantee that you will receive Social Security disability benefits.
- VA compensation will not affect your Social Security benefits.

**Presumptive Disability (PD) or Presumptive Blindness (PB) for SSI Eligibility**

- SSI claim
- Payments for up to 6 months while waiting for DDS to make a final decision
- Based on the severity of your condition and the high likelihood the claim will be ultimately approved
- Not based on your financial need

**Presumptive Disability (PD) or Presumptive Blindness (PB) for SSI Eligibility**

- SSI benefits may start right away based on PD or PB determination if you have:
  - Amputation of a leg at the hip
  - Allegation of total deafness or total blindness
  - Allegation of cerebral palsy
  - Allegation of Down syndrome
Presumptive Disability (PD) or Presumptive Blindness (PB) for SSI Eligibility

• Continued:
  • Low-birth weight baby born weighing less than 1200 grams (2 pounds, 10 ounces) at birth
  • Symptomatic HIV infection or AIDS
    • "SSA-4814-F5 or SSA-4815-F6 needed"
  • Physician confirmation of a terminal illness with a life expectancy of six months or less or under hospice care

ssa.gov/ssi/text-expedite-ussi.htm

Presumptive Disability (PD) or Presumptive Blindness (PB) for SSI Eligibility

• Continued:
  • Spinal cord injury producing the inability to ambulate
  • Allegation of end-state renal disease (ESRD) requiring dialysis
  • Allegation of ALS (Lou Gehrig’s disease)
  • Allegation of stroke more than three months in the past

Completing the Forms
“What DDS Wants to Know”
Disability Determination Services (DDS)

- This state agency completes the initial disability determination decision for us.
- Doctors and disability specialists in the state agency ask your doctors for information about your condition(s). They'll consider all the facts in your case.
- They'll use the medical evidence from your doctors, hospitals, clinics, or institutions where you've been treated.

Disability Determination Services (DDS)

- Third party filers are encouraged to contact DDS examiners directly with any questions related to specific claims.
- You should receive correspondence with a barcode and/or Function Report/Work History Report from the DDS examiner once the claim is assigned. You can use the barcode to fax medical records and forms to DDS for inclusion in applicant's electronic file. If you do not receive a barcode, you can call the examiner and ask them to send one to you.

Five Step Sequential Evaluation

- Is person working at SGA?
- Does person have severe impairment?
- Does impairment meet or equal the listing?
- Does impairment allow for past relevant work?
- Does impairment allow for any other work?

Yes

DENIAL

DENIAL

APPROVAL

DENIAL

APPROVAL

No

DENIAL

DENIAL

APPROVAL

DENIAL

APPROVAL
Also known as “The Social Security Blue Book”

- Provides physicians and other health professionals with an understanding of the disability programs administered by the Social Security Administration
- Explains how each program works, and provides information to help health professionals make sound and prompt determinations and decisions on disability claims
- Lists specific criteria under which claimants who suffer from a disabling condition can qualify for Social Security disability benefits.

We’ll tell you our decision…

- When the state agency makes a determination on your case, we’ll send a letter to you.
- If approved, the letter will show the amount of your benefit, when your payments start, and your reporting responsibilities.
- If not approved, the letter will explain why and tell you how to appeal the determination if you don’t agree with it.

SSDI Appeals and Allowances

- Processed by the SSA office of jurisdiction.
- Depending on the level of approval, some cases may be referred to the Payment Center for adjudication and completion.
- Technical (non-medical decisions) and initial allowances are typical adjudicated in the local Social Security office.
SSI Appeals and Allowances

- Processed by the SSA office of jurisdiction.
- Applicant will more than likely be scheduled for a PERC (Pre-Effectuation Review Conference) appointment at the SSA office before payments can begin to make sure the applicant is still financially eligible for benefits and to update any other information.
- You do not have to wait for the scheduled appointment to complete the PERC – the applicant can call in to any office before that time.
- If the applicant doesn’t make the scheduled appointment, they still have another 15 days to walk-in/call-in to the SSA and complete the paperwork.

Checklist for Initial Disability Claims

- SSA-3288: Consent for Release of Information
- SSA-1696: appointment of Representative
- SSA-827: Authorization to Disclose Information to SSA
- SSA-8000: Application for Supplemental Security Income (SSI)
- SSA-16: Application for Social Security Disability Insurance (SSDI) / iDIB file online
- SSA-3368: Adult Disability Report
- *SSA-4814 Applicants who are HIV+
Checklist for Childhood Disability Claims

SSA-3288: Consent for Release of Information
SSA-1696: Appointment of Representative
SSA-827: Authorization to Disclose Information to SSA
SSA-8000: Application for Supplemental Security Income (SSI)
SSA-3289: Disability Report – Child / iSSI file online
*SSA-4815 Child Applicants who are HIV+
Latest School Progress Reports – Individualized Education Plan (IEP); and

Childhood Function Report Based on Age:
• SSA-3375 Function Report - Birth to 1 year;
• SSA-3376 Function Report – Age 1 to 3 year birthday;
• SSA-3377 Function Report – Age 3 to 6 birthday;
• SSA-3378 Function Report - Age 6 to 12th birthday
• SSA-3379 Function Report - Age 12 to 18th birthday

SSA-3288: Consent for Release of Information
Submit to SSA with the complete application packet.
The SSA-3288 can only be entered into SSA’s system once an application has been submitted.
Serving as an Appointed Representative

- As the applicant’s appointed representative, the appointed representative can communicate with SSA and DDS about the applicant’s file and will receive copies of all applicant communication from SSA/DDS.
- Neither the appointed representative nor his/her agency is liable for any decision(s) made by SSA or DDS.
- This is NOT the same as the representative payee.

SSA-1696: Appointment of Representative

Submit to SSA with the complete application packet.

The SSA-1696 can only be entered into SSA’s system once an application has been submitted.

*current version 08/2020
SSA-1696 - continued

- Make sure the SSA-1696 is signed by the applicant AND the Authorized Representative

- Make sure all of your information (address/phone/fax/zip) is included on this form, as well as the applicant's information.
Use the Remarks Section on the Disability Reports and paper applications to include the code VPAP (Vulnerable Populations Application)

II. Appointed Representative Services (ARS)

ARS gives representatives real time and up-to-date access to clients’ electronic folder (eFolder) for cases pending at the initial, reconsideration, hearing and appeals level.

Representatives can:
- Download eFolder contents including multimedia files
- Upload medical evidence and other documents into eFolder
- Download status reports with key information regarding pending and recently closed cases

To enroll in ARS, contact your local hearing office and request an invitation to enroll. You must have a text enabled cell phone.

www.ssa.gov/ar
Appointed Representative Services (ARS)

- Non-attorney representatives that do not request direct payment of authorized fees are eligible to enroll for eFolder access.
- Must have active cases pending to be eligible to enroll.

www.ssa.gov/ar

Applying for Social Security Disability Insurance (SSDI)

- SSDI is an insurance program -- not needs-based
- Information not collected: resources, assets, or living arrangements.
- Eligibility: generally based on work history and earnings record
  - Applicant may also qualify based on a parent or spouse’s record

Applying for Social Security Disability Insurance (SSDI)

- SSDI application also explores eligibility for other benefit programs (Worker’s Compensation, VA benefits, etc.)
- SSA prefers online submissions
SSA-16: Application for SSDI

If filing online, use SSA-16 paper form as a worksheet.
Transfer information to Online Disability Benefit Application, when ready to submit.

Now, let’s take a look at the Authorization to Disclose Information to the Social Security Administration
The SSA-827

Collecting Medical Records
Submit to SSA with the complete application packet.
A signed SSA-827 gives SSA permission to request copies of medical records, education records, and other information related to applicant’s ability to perform tasks.
SSA-827: Authorization to Disclose Information to SSA

- The SSA-827 allows SSA/DDS to gather medical records and information from medical records departments
- The applicant will “e-sign” an e827 Medical Release as part of the Online Disability Benefit application
- We also recommend submitting a signed SSA-827 form to SSA as part of the complete application packet
- You will submit an SSA-827 to each medical provider along with the agency’s release form

The SSA-827 – Age 12 or Over

The claimant (child) signs in the “INDIVIDUAL authorizing disclosure” signature box on the left; and

The parent, guardian, or other authorized personal representative:

- Marks the appropriate entry in the “IF not signed by subject of disclosure” relationship block;
- Signs in the box below the check boxes; and
- IF he or she signs as “other personal representative,” then he or she explains the basis for authority to sign in the space provided.

The SSA-827 – Under Age 12

When the claimant is under age 12, the child’s applicant should:

- Sign the “INDIVIDUAL authorizing disclosure” box;
- Mark the appropriate entry in the “IF not signed by subject of disclosure” relationship block; and
- If he / she sign as “other personal representative,” then he / she explains the basis for authority to sign in the space provided.
Applying for Supplemental Security Income (SSI)

- SSI is needs-based
- Income, resources, living arrangement
  - Legal status and citizenship/residency also affect eligibility
- Long application but many questions regarding resources
  - Don’t assume applicant does or does not have resources

SSA-8000: Application for SSI

This is the full SSI application (not the same as the iSSI).
Cannot be submitted online.

Supplemental Security Income (SSI): iSSI

- As of April 1, 2017, the iSSI application can be completed as part of the Online Disability Benefit Application.
- iSSI is a limited deferred SSI application and is not the same as the SSA-8000; the applicant will need to answer additional questions from SSA about income and resources.
- Eligibility criteria includes: age 18-65; not blind; never been married; never applied for/received disability benefits, etc.
SSA-3368: Adult Disability Report

• SSA-3368 gathers information about the applicant’s work history, medical treatment and education.
• Complete information is essential.
• DDS will request records from medical sources listed.
• Indicate in “Remarks” which medical records you will be submitting with the application and whether there are conditions for which applicant has not received treatment.
• SSA prefers online submissions.

Completeness Helps
The more you are able to provide, the better picture SSA has.

SSA-3368: Adult Disability Report

Adult Function Report

• Be aware that DDS WILL REQUIRE a completed Function Report - Adult (SSA-3373) at some point during the claims process.
• You can turn this form in with your packet when you submit the claim if you wish. This will assist in overall expedition of claim.
• Expect to receive one in the mail from DDS shortly after your claim is assigned to an examiner.
Adult Function Report

- You can use a lot of the functioning information you have already gathered (for the Medical Summary Report) to complete the Function Report with client.
- You can also ask other people that know the applicant well to complete a Third Party Function Report.

SSA-4814: Medical Report on Adult with Allegation of HIV Infection

- Transfer information to Online Disability Benefit Application, when ready to submit

SSA-3820: Disability Report - Child

Provide as much information as possible.
The more information SSA has, the better.
Physicians, medications—everything is important.
Child Function Report

- Be aware that DDS WILL REQUIRE a completed Function Report (SSA-3375 – 3379 based on age) at some point during the claims process.
- You can turn this form in with your packet when you submit the claim if you wish. This will assist in overall expedition of claim.
- Expect to receive one in the mail from DDS shortly after your claim is assigned to an examiner.
- You can use a lot of the functioning information you have already gathered (for the Medical Summary Report) to complete the Function Report with client.
- If applicable, please include school progress reports (IEP Individualized Education Plan). Some schools no longer complete forms mailed by DDS.
Let’s begin with the Disability Report - Adult

SSA-3368-BK

Internet Adult Disability Report

- The Internet Adult Disability Report (i3368) is a tool that gives an applicant and third parties the ability to provide medical and work history information electronically.
- Users can complete the i3368 over multiple sessions using an automatically assigned application number.
- The report sometimes displays additional questions and information based on responses and actions.

1st party applicants are given an option to electronically sign or Print, Sign, and Mail the SSA-827 to their local SSA office.
- The address of the local office is provided, based on the applicant’s zip code.
- Third party users do not have the option to electronically sign the SSA-827.
- Use the Office Locator on our Contact Page for local SSA office information.
Be sure to print and save your Re-entry Number.

List all medical conditions that apply.

Height and weight without shoes.

When and why did you stop working? Indicate if related to health or other reason.


If working, complete page 3, Question 4F.

If working, complete page 3, Question 4F.

Change in work activity?

SSA-821 needed.

Please provide complete school information.

Please do not put "Don't know" or "Can't remember" as an answer in this section.

Types of jobs, not by employers, i.e. waitress for 15 years – list once even if 5 different restaurants.

Special education classes.

SocialSecurity.gov
One job the last 15 years
Do not complete if more than one job in the last 15 years

Walking/Standing/ Sitting/Climbing should EQUAL hours/day worked

Securing today and tomorrow

One job the last 15 years

Walking/Standing/ Sitting/Climbing should EQUAL hours/day worked

Securing today and tomorrow

One job the last 15 years

Walking/Standing/ Sitting/Climbing should EQUAL hours/day worked

Securing today and tomorrow

One job the last 15 years

Walking/Standing/ Sitting/Climbing should EQUAL hours/day worked

Securing today and tomorrow

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One job the last 15 years

Walking/Standing/ Sitting/Climbing should EQUAL hours/day worked

Securing today and tomorrow

One job the last 15 years

Walking/Standing/ Sitting/Climbing should EQUAL hours/day worked

Securing today and tomorrow

One job the last 15 years

Walking/Standing/ Sitting/Climbing should EQUAL hours/day worked
List all doctors, hospitals, clinics, and other health care facilities who may have medical records about your condition.

Mark all tests performed in the past and or scheduled to be performed.

List all doctors, hospitals, clinics, and other health care facilities who may have medical records about your condition.

Only complete if already receiving SSI.

List workers' compensation, vocational rehabilitation, or insurance company who may have medical records about your condition.

Only complete if already receiving SSI.

Note additional sources (school, medical, family or friend) or any additional comments to support medical condition(s).

Date Report Completed.
Completing Function Report
Adult
SSA-3369-BK
& SSA-3373-BK
*Typically mailed by DDS within 30 days of receipt of claim

Work History Report
SSA-3369-BK

Five Step Sequential Evaluation

- Is person working at SGA?
  - NO: Denial
  - YES: Proceed to next step

- Does person have severe impairment?
  - NO: Denial
  - YES: Proceed to next step

- Does impairment meet or equal the listing?
  - NO: Denial
  - YES: Proceed to next step

- Does impairment allow for past relevant work?
  - NO: Denial
  - YES: Proceed to next step

- Does impairment allow for any other work?
  - NO: Denial
  - YES: Approval
Our Cover Letter

- We need to know about your past work.
- Please complete and return the attached form within 10 working days of your receipt of this letter.
- Failure to provide the requested information may result in a decision being made on your claim based on the evidence already in file. This could result in a finding of not disabled or cessation.

Information About Your Work
List ALL the jobs you had in the last 15 years before becoming unable to work due to illnesses, injuries, or conditions.

- Record the type of job performed, not the individual employers you had.
- The job title alone is not a sufficient description of the work performed. Provide a complete and detailed description of your daily tasks. Describe each job as if you were training your replacement.
- If you had multiple jobs at the same company, describe each job separately. Include the dates you performed each job.
- Complete ALL of the questions for all jobs. Leave no blanks.
- Provide 15 years of work information. List any years you were unemployed.

Please do not put "Don’t know" or "Can’t remember" as an answer in this section.
Truck Driver

I drove an 18-wheeler over the road, delivering loads to the correct destination. I tried down the loads, checked my tires, and did routine maintenance on the truck. When I delivered the load, I signed paperwork confirming delivery.

I performed the same tasks at job #1, #3, #4, and #7.

---

**Example Job Description**

If the form does not provide enough space, you can put additional information on the last page or add your own pages.
Only Six Pages?

While the form itself only has six actual pages available to give job descriptions, if the claimant has more than six jobs in the last 15 years, please use additional forms or a sheet of paper and follow the format outlined in the form.

Now, let’s take a look at the Function Report

The SSA-3373-BK

Our Cover Letter

- It order to obtain a more detailed description of your daily activities, it is necessary you complete the enclosed Function Report.
- A friend or relative may assist you.
- A postage-paid return envelope or label is enclosed for your convenience.
- FAX reports to 1-866-461-8140 (NM DDS) continued…
Our Cover Letter

Please fax cover letter and Function Report together for reports to be properly associated into our SSA system. You Must Always use the Request Letter with the barcode as your cover (top/first) sheet.

If this is a new number, different since filing, please note that on form.

Do not use this area to list what is wrong (e.g., back pain, leg pain), instead tell us how both mental & physical problems limit the ability to function on a daily basis (at home and at work).

You can use this space to give additional information that is not asked in questions.
139

These questions can be especially helpful when evaluating mental impairments:

1. Do you need any special assistance to take care of personal needs and personal hygiene?
   - Yes
   - No

2. Do you need help or remember taking medications?
   - Yes
   - No

3. What percent of the time do you need help?
   - More than 50%
   - Less than 50%
   - Very little

- More often do you prepare food in meals (for example, brake, egg, milk) monthly?
- How often do you prepare food in meals to go?
- How long does it take you?
- How many meals do you eat daily?
- How many meals do you eat weekly?

4. If you can’t afford to do any personal needs, please explain:

5. If you have any other concerns about your medical or mental health, please explain:

6. How much time does it take you, and how often do you do each of these things?

7. Do you need help in encouragement doing these things?

- Yes
- No

Please use the space below to explain why you need someone to accompany you (even though there are no lines to write on):

140

This information is helpful for both mental and physical impairments – especially when given details:

10. OFFDUTY ACTIVITIES

- How often do you go outside?
- Do you need help to go outside?

11. DENTAL HEALTH

- Do you need help with dental hygiene?
- Do you need help with dental care?

12. SKILLS

- Can you do any household chores?
- Can you do any outside chores?
- Can you do any work related tasks?

13. KNOWLEDGE

- Do you need help with any financial planning?
- Do you need help with any legal issues?
- Do you need help with any medical issues?

14. SOCIAL ACTIVITIES

- Do you need help with social activities?
- Do you need help with emotional support?
- Do you need help with financial support?

Please use the space below to explain why you need someone to accompany you (even though there are no lines to write on):

141
Please provide explanatory information about each box checked. If you run out of room, please put additional information on the last page.

For each box checked, please complete the questions below.

- If a person wears glasses, provide when prescribed and by whom.

Additional Thoughts

- Detailed descriptions for all questions are helpful. Details can make a big difference.
- Providing “why” you cannot do a particular function is very informative. For example:
  - Don’t just say you shop for 2 hours, tell us how you shop
    - Do you use an electric chair?
    - Do you lean on a buggy?
    - Do you take breaks to sit while shopping?
**Additional Thoughts**

- Long letters from the claimant are not normally helpful unless they describe specific ways they are limited by their impairment(s).
- Consistency is important. For example, if you indicate you have “no trouble” getting along with others and then check the “trouble getting along with others” box, this will require a phone call to the claimant.

---

**Additional Thoughts**

- Checking boxes without clarification is not very helpful.
- Legible writing is important.

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**Disability Report - Child**

*SSA-3820-BK & Function Reports*
The Internet Disability Report - Child (i3820) provides the public with the ability to complete the form online. Users can complete the i3820 over multiple sessions using an automatically assigned reentry number. The i3820 will calculate the age of the child based on the information entered on the screening page to ensure that the child is under age 18.

Internet Disability Report - Child

• The child must meet these requirements:
  • Has a social security number
  • Has not attained age 18, and
  • Has not been denied disability benefits within the past 60 days, and
  • Lives in one of the 50 States, the District of Columbia, or the Northern Mariana Islands (applicant and child).
Internet Disability Report - Child

- Users are directed to a link to the PDF version of the SSA-827.
- They are instructed to print, sign, date, and return the SSA-827s to the local SSA office.
- Use the Office Locator on our Contact Page for local SSA office information.

ssa.gov/agency/contact

SocialSecurity.gov
Our Cover Letter

- It order to obtain a more detailed description of your daily activities, it is necessary you complete the enclosed Function Report.
- A friend or relative may assist you.
- A postage-paid return envelope or label is enclosed for your convenience.
- FAX reports to (DDS) continued…

Please fax cover letter and Function Report together for reports to be properly associated into our SSA system. You Must Always use the Request Letter with the barcode as your cover (top/first) sheet.
Additional Thoughts

• Detailed descriptions for all questions are helpful. Details can make a big difference.

• Providing “why” your child cannot do a particular function is very informative. For example:
  – Don’t just say you play for 2 hours, tell us how the child plays:
    • Does the child play well with other children?
    • Does the child experience shortness of breath while playing?

Additional Thoughts

• Long letters from the parent / guardian are not normally helpful unless they describe specific ways the child is limited by their impairment(s).

• Consistency is important. For example, if you indicate child has “no trouble” getting along with others and then check the “trouble getting along with others” box, this will require a phone call to clarify.

Completing Function Report
Child
SSA-3375-BK
thru SSA-3379-BK

*Typically mailed by DDS within 30 days of receipt of claim
Function Reports - Child

<table>
<thead>
<tr>
<th>Form</th>
<th>Age Based</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSA-3375-BK</td>
<td>Birth to 1st Birthday</td>
</tr>
<tr>
<td>SSA-3376-BK</td>
<td>Age 1 to 3rd Birthday</td>
</tr>
<tr>
<td>SSA-3377-BK</td>
<td>Age 3 to 6th Birthday</td>
</tr>
<tr>
<td>SSA-3378-BK</td>
<td>Age 6 to 12th Birthday</td>
</tr>
<tr>
<td>SSA-3379-BK</td>
<td>Age 12 to 18th Birthday</td>
</tr>
</tbody>
</table>

SSA-3375-BK
Function Report – Child
Birth to 1st Birthday

SSA-3376-BK
Function Report – Child
Age 1 to 3rd Birthday

SSA-3377-BK
Function Report – Child
Age 3 to 6th Birthday

SSA-3378-BK
Function Report – Child
Age 6 to 12th Birthday

SSA-3379-BK
Function Report – Child
Age 12 to 18th Birthday
<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the child have a car?</td>
<td>No</td>
</tr>
<tr>
<td>Does a relative have a car?</td>
<td>No</td>
</tr>
<tr>
<td>Does the child have a separate room of their own?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have access to a refrigerator, stove, and microwave?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have access to a kitchen?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have a phone?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have access to a television?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have access to a computer?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have access to a printer?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have access to a machine to make food?</td>
<td>Yes</td>
</tr>
<tr>
<td>Does the child have access to a washer and dryer?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Section 1: Behavioral**

**Section 2: Social**

**Section 3: Educational**

**Section 4: Medical**

**Section 5: Employment**

**Section 6: Legal**

**Section 7: Personal**

**Section 8: Miscellaneous**

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**Footer: SocialSecurity.gov**
The Social Security Express Icon initiative, where we team up with local community organizations (e.g., Veterans Administrations, Health and Human Services, Libraries, Retirement Homes, etc.) to install an icon shortcut to ssa.gov on their existing public computers started in November 2013.

The Icon offers a choice of quick or full service menu options to select various eServices, such as My Social Security.

- There are no additional costs to the Agency.

https://www.ba.ssa.gov/onlineservices/Gservices/
Electronic Records Express (ERE)

• Electronic Records Express offers electronic options for submitting health and school records related to disability claims. ERE allows submission of records via:
  – Online to Social Security’s secure website, or
  – By fax

• All ERE options are free of charge.
• The website has restricted access.
• Authorized users assigned user ID and password.
• ERE Help Desk (866) 691-3016; email is electronic-records-express@ssa.gov
• Website: https://www.ba.ssa.gov/ere/

Appeals

If you recently applied for Social Security or Supplemental Security Income disability benefits and were denied for medical reasons, you may file an appeal within 60 Days of the date of your decision notice. You can appeal online and can check the status using your personal and secure my Social Security account.
History and Background of iAppeals

Background of the iAppeal

SSA developed iAppeals to meet:
• public demand for more Internet services
• requirements of Government Paperwork Elimination Act of 1998

The iAppeal allows most claimants who are appealing medical or non-medical decisions to complete and submit:
• 561 – online Request for Reconsideration
• 501 – online Request for Hearing by Administrative Law Judge
• 520 – online Request for Appeals Council Review
• 3441 – online Disability Report – Appeal

Benefits of the iAppeal
Benefits

- Simple instructions
- Guides user through process
- Printable receipt
- Reduces delays
- Saves time
- Saves money
- Single submission
- Minimizes follow-ups

iAppeals Hours of Operation

Monday-Friday: 5 a.m.-1 a.m.
Saturday: 5 a.m.-11 p.m.
Sunday: 8 a.m.-11:30 p.m.
For technical issues, call 1-800-772-1213
Monday-Friday
7 a.m.-7 p.m. (EST)

The iAppeal Process
Getting Ready to Complete an iAppeal

Gather client’s personal information:
- Name, Social Security number, address, and phone number
- Date of denial decision
- Representative’s name, address, and phone number

Attachment Utility

- Claimants and third party representatives can submit attachments with iAppeal.
- Users may upload any form, including:
  - Claimant’s Appointment of Representative (SSA-1696)
  - Fee agreement
  - Authorization to Disclose Information to the Social Security Administration (SSA-827)
  - Questionnaire for Children Claiming SSI Benefits (SSA-3881)
  - Good Cause for late filing statement
  - Additional medical evidence
- All signatures must be originals.
Attachment Utility Tips

- Limits: maximum of 10 files. Cannot exceed 50 MB combined
- Acceptable file types: .doc, .docx, .tif, .tiff, and .pdf
- Password-protected files cannot be processed

Medicare

Medicare

Original Medicare
- Part A (Hospital Insurance)
- Part B (Medical Insurance)

Medicare Advantage (aka Part C)
- Part A (Hospital Insurance)
- Part B (Medical Insurance)

Most plans include:
- Part D (Prescription Drug Plan)
- Extra Benefits (e.g. vision, hearing, dental, and more)

You can add:
- Part D (Prescription Drug Plan)

You can also add:
- Supplemental insurance coverage (Medigap)

Some plans also include:
- Lower out-of-pocket costs

Medicare.gov

SocialSecurity.gov
Medicare Eligibility

- Age 65
- ALS
- Kidney failure
- Environmental health hazard exposure
- After 24 months of SSDI

Medicare Enrollment

- Initial Enrollment Period: Begins 3 months before your 65th birthday and ends 3 months after that birthday
- General Enrollment Period: January 1 – March 31
- Special Enrollment Period: If 65 or older, you & your spouse are still working, and you’re covered under a group health plan

Medicare Part B Coverage

If you enroll in this month of your initial enrollment period:

<table>
<thead>
<tr>
<th>Period</th>
<th>Coverage Start</th>
</tr>
</thead>
<tbody>
<tr>
<td>One to three months before you reach age 65</td>
<td>The month you reach age 65</td>
</tr>
<tr>
<td>The month you reach age 65</td>
<td>One month after the month you reach age 65</td>
</tr>
<tr>
<td>One month after you reach age 65</td>
<td>Two months after the month of enrollment</td>
</tr>
<tr>
<td>Two or three months after you reach age 65</td>
<td>Three months after the month of enrollment</td>
</tr>
</tbody>
</table>
How to File for Part B in SEP

If you have Medicare Part A and wish to add Part B under a Special Enrollment Period, you have one of three options:

1. Online application
2. Fax completed forms to 1-833-914-2016
3. Mail completed forms to local Social Security office

If faxing or mailing, download fillable forms from www.ssa.gov/forms:

1. CMS-40B (Application for Enrollment in Medicare – Part B)
2. CMS-L564* (Request for Employment Information)

*If employer cannot sign CMS-L564, SSA may accept other evidence.

Expedite Part B with Online Application

1. Complete online application, "Apply Online for Medicare Part B During a Special Enrollment Period".
2. Upload documentation from list of acceptable evidence to verify coverage under Group Health Plan (GHP) or Large Group Health Plan (LGHP).
3. A digital signature and email address are required.
   • Once you submit application, you will receive an email.
   • You must respond to instructions in email before SSA processes your application.

Note: If you and your spouse are both applying for Part B under an SEP, you must file separate applications.

Medicare Coverage

Part A
• Covers most inpatient hospital expenses
• 2021 Deductible $1,484

Part B
• Covers 80% of doctor’s bills & other outpatient medical expenses after the first $203 in approved charges
• 2021 Standard Monthly Premium $148.50

Medicare Advantage (aka Part C)
• Health care services through a provider organization.

Part D
• Covers a major portion of prescription drug costs
Medicare Standard Part B Premiums for 2021

If you're single and file an individual tax return, or married and file a joint tax return:

<table>
<thead>
<tr>
<th>Modified Adjusted Gross Income (MAGI)</th>
<th>Part B monthly premium amount</th>
<th>Prescription drug plan monthly premium amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals with a MAGI of $88,000 or less</td>
<td>2021 standard premium = $148.50</td>
<td>Your plan premium = $0</td>
</tr>
<tr>
<td>Married couples with a MAGI of $176,000 or less</td>
<td>Standard premium = $59.40</td>
<td>Your plan premium = $12.30</td>
</tr>
<tr>
<td>Individuals with a MAGI above $88,000 up to $111,000</td>
<td>Standard premium = $148.50</td>
<td>Your plan premium = $31.80</td>
</tr>
<tr>
<td>Married couples with a MAGI above $176,000 up to $222,000</td>
<td>Standard premium = $59.40</td>
<td>Your plan premium = $12.30</td>
</tr>
<tr>
<td>Individuals with a MAGI above $111,000 up to $138,000</td>
<td>Standard premium = $237.60</td>
<td>Your plan premium = $51.20</td>
</tr>
<tr>
<td>Married couples with a MAGI above $222,000 up to $276,000</td>
<td>Standard premium = $93.00</td>
<td>Your plan premium = $20.60</td>
</tr>
<tr>
<td>Individuals with a MAGI above $138,000 up to $165,000</td>
<td>Standard premium = $326.70</td>
<td>Your plan premium = $77.10</td>
</tr>
<tr>
<td>Married couples with a MAGI above $276,000 up to $330,000</td>
<td>Standard premium = $51.20</td>
<td>Your plan premium = $20.60</td>
</tr>
<tr>
<td>Individuals with a MAGI equal to or greater than $500,000</td>
<td>Standard premium = $356.40</td>
<td>Your plan premium = $77.10</td>
</tr>
<tr>
<td>Married couples with a MAGI equal to or greater than $750,000</td>
<td>Standard premium = $51.20</td>
<td>Your plan premium = $20.60</td>
</tr>
</tbody>
</table>

MyMedicare.gov
1-800-MEDICARE or Medicare.gov

SocialSecurity.gov
Employment-support provisions intended to assist you in your efforts to become self-sufficient through work.

Designed to help beneficiaries enter, re-enter, or stay in the workforce by protecting their eligibility for cash payments and/or health care.

MUST REPORT ALL EARNINGS TO SOCIAL SECURITY

socialsecurity.gov/redbook

SocialSecurity.gov
SSDI Work Incentives
Helping you return to work -
**Trial Work Period** (TWP): 9 months (not necessarily consecutive) in a rolling 60-month period.

**Extended Period of Eligibility** (EPE): 36-month period following the TWP. Benefits paid for months below the substantial gainful activity (SGA) level ($1,310). Payment suspension for months over the SGA level. Payment restarts if work level is under SGA.

**Medicare** Continuation: 93 months following TWP

---

SSI Work Incentives

- **Earned Income Exclusion**: $65 & ½ remaining
- **Student Earned Income Exclusion (under 22)**:
  - 2021: $1,930/month (max: $7,770/year)
- **Medicaid While Working - Section 1619(b)**
- **Blind Work Expenses**

---

SSDI and/or SSI Employment Supports

**Contents**
- Impairment-Related Work Expenses (IRWE)
- Subsidies and Special Conditions
- Unsuccessful Work Attempt (UWA)
- Expedited Reinstatement (EXR)
- Plan to Achieve Self-Support (PASS)
- Ticket to Work (TTW)
“Substantial gainful activity” (SGA) is a term used to describe a level of work activity and earnings. We generally use earnings guidelines to evaluate whether your work activity is SGA.

- If the impairment is anything other than blindness, earnings in 2021 averaging over $1,310 a month generally demonstrate SGA.
- The SGA amount in 2021 for blind individuals is $2,190.
- SSI only uses SGA as a measure of work during initial claims.
- SSDI uses SGA throughout the life of the claim.

**SSDI Only Employment Supports**

**Contents**
- Trial Work Period (TWP)
- Extended Period of Eligibility (EPE)
- Continuation of Medicare Coverage
- Medicare for Persons with Disabilities Who Work

**Trial Work Period (TWP)**
- Allows SSDI beneficiaries time to test their ability to work
- 9 Months, not necessarily consecutive
- “Rolling” 60 month period
- Full SSDI benefit continues regardless of earnings
- Months over $940 in gross earnings (2021) or more than 80 hours of self employment are considered TWP months.
- Cannot begin before the month of entitlement or the month of filing, whichever is later.
Extended Period of Eligibility (EPE)

- The EPE begins the month after the Trial Work Period (TWP) ends, even if you are not working that month.
- The first 36 months of the EPE is the re-entitlement period.
- During the re-entitlement period:
  - if work or monthly earnings are below SGA, benefits are payable;
  - if work or monthly earnings are above SGA, benefits are suspended.
- EPE ends with the later of:
  - the month before the first month of SGA earnings after the re-entitlement period, or
  - the second month after the month of disability cessation due to SGA.

Cessation Month and Grace Period:

- **Cessation Month**: the first month work or monthly earnings exceed SGA after the end of the TWP
- **Grace Period**: the two months immediately following the cessation month

> NOTE: Benefits are paid for the cessation month and the grace period, whether or not the beneficiary is earning over SGA.
Continuation of Medicare Coverage

• Although cash benefits may cease due to work, continued health insurance is possible.

• Most beneficiaries who work will continue to receive at least 93 consecutive months of Part A; Part B (if enrolled); and Part D (if enrolled). There is no premium for Part A.

• The 93 months start the month after the last month of the TWP.

• To qualify, beneficiary must already have Medicare and be working at SGA level but not medically improved.

Medicare for Persons with Disabilities Who Work

After premium-free Medicare coverage ends due to work, a disabled individual may buy continued Medicare coverage as long as he/she remains medically disabled.

To qualify, the individual:
• must be under age 65, and
• continue to have a disabling impairment, and
• Medicare must have stopped due to work.

Hospital Insurance (Part A) is available for $471.00 per month in 2021; ($259 if you paid Medicare taxes for 30-39 credits). Supplemental Medical Insurance (Part B) is available for $148.50 per month in 2021.

SSI Only Employment Supports

Contents
• Earned Income Exclusion
• Student Earned Income Exclusion (SEIE)
• Special SSI Payments for Persons Who Work - Section 1619(a)
• Medicaid While Working - Section 1619(b)
SSI does not count the first $65 of the earnings received in a month, plus one-half of the remaining earnings. This means we count less than one-half of earnings when we figure the SSI payment amount.

We apply this exclusion in addition to the $20 general income exclusion.

We apply the $20 general income exclusion first to any unearned income received.

**Earned Income Exclusion**

- You earn **$885 a month** (no other income):
  - Wages $885
  - $20 (general income exclusion)
  - $65 (earned income exclusion)
  - $800 divided by 2 = $400 countable income
  - $794 (SSI maximum)
  - $400 (countable income)
  - $394 SSI check + $885 wages = $1279 total

**Student Earned Income Exclusion (SEIE)**

If you are under age 22 and regularly attending school, we do not count up to $1,930 of your earned income per month when we figure the SSI payment amount. The maximum yearly exclusion for 2021 is $7,770.

"Regularly Attending School" means:
- in a college or university for at least 8 hours a week, or
- in grades 7-12 for at least 12 hours a week, or
- in a training course to prepare for employment for at least 12 hours a week (15 hours a week if the course involves shop practice), or
- for less time than indicated above for reasons beyond the student's control, such as illness, or
- home schooling, if instructed in grades 7-12 for at least 12 hours a week.
You can receive SSI cash payments even when earned income is at the Substantial Gainful Activity (SGA) level. This provision eliminates the need for the trial work period or extended period of eligibility under SSI.

To qualify, you must:

- have been eligible for an SSI payment for at least 1 month before working at the SGA level, and
- still be disabled, and
- meet all other eligibility rules, including income and resource tests.

Under 1619(a), a beneficiary can receive their gross income from wages, an SSI payment (calculated based on wages) and Medicaid.

**Special SSI Payments for Persons Who Work - Section 1619(a)**

**How it works?**

- After you return to work, Medicaid coverage can continue (if needed to work), even if your earnings become too high for an SSI cash payment.
- If your state provides Medicaid to persons on SSI, you will continue to be eligible for Medicaid. Each state has a Medicaid threshold. In Texas, the 2021 threshold is $47,676.

**Do you need to apply?**

You do not need to file a special application; just keep us up to date on your work activity.

**Medicaid While Working – Section 1619(b)**

After you return to work, Medicaid coverage can continue, even if your earnings become too high for an SSI cash payment.

To qualify, a beneficiary must meet **ALL** of the following:

- was eligible for an SSI cash payment for at least 1 month
- would be eligible for cash payment except for earnings
- still be disabled
- meet all other eligibility rules, including the resources test
- need Medicaid in order to work
- have gross earned income that is insufficient to replace SSI, Medicaid, and any publicly funded attendant care

Under 1619(b), a beneficiary will receive income from gross wages and Medicaid but no SSI payment.
Reinstating SSI Eligibility Without a New Application

How does it help you?

• If you have been ineligible for Supplemental Security Income (SSI) payments due to your work, you may be able to restart your SSI cash payments again at any time without a new application.

• If you have been ineligible for SSI and/or Medicaid for any reason other than work or medical recovery, you may be able to restart your SSI cash payment and/or Medicaid coverage within 12 months without a new application.

• When your situation changes, contact us and ask about how you can restart your SSI benefits and/or Medicaid.

Special SSI Rule for Blind People Who Work

• There is a special rule to help people who work and receive Supplemental Security Income (SSI) based on blindness.

• This rule allows a blind person to exclude from earned income all expenses that enable the person to work.

• The expense does not need to be related to the blindness.

• Examples: service animal, transportation to/from work, taxes, meals eaten at work, medical, attendant, etc.

SSDI and/or SSI Employment Supports

Contents

• Impairment-Related Work Expenses (IRWE)
• Subsidies and Special Conditions
• Unsuccessful Work Attempt (UWA)
• Expedited Reinstatement (EXR)
• Plan to Achieve Self-Support (PASS)
• Ticket to Work (TTW)
We deduct the cost of certain impairment-related items and services that are needed to work from gross earnings when we decide if your work is SGA.

Example:
Beneficiary is earning $1350.00 per month in gross wages. His monthly co-pay for his disability related medications is $50.00.

$1350 - $50 = $1300 - This is countable income when determining SGA.

<table>
<thead>
<tr>
<th>Type of Expense</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation Costs</td>
<td>The cost of structural or operational modifications to vehicle that is needed to travel to work. The cost of driver assistance or taxicabs if public transportation is not available or not accessible.</td>
</tr>
<tr>
<td>Attendant Care Services</td>
<td>Services performed in the work setting. Services performed to help prepare for work, the trip to and from work and after work.</td>
</tr>
<tr>
<td>Service Animals</td>
<td>Expenses paid in operating a guide dog or other service animal that enables beneficiary to overcome functional limitations in order to work.</td>
</tr>
<tr>
<td>Medical Devices</td>
<td>Deductible devices include wheelchairs, dialysis equipment, pacemakers, respirators, traction equipment, and braces.</td>
</tr>
<tr>
<td>Prosthetics</td>
<td>Artificial, artificial replacement of an arm, leg, or other part of the body.</td>
</tr>
<tr>
<td>Residential Modifications</td>
<td>Employed outside of home - modifications to exterior to permit access to the street or transportation. Self-employed at home - modifications made to create workspace to accommodate impairment.</td>
</tr>
<tr>
<td>Prescription Drugs</td>
<td>Regularly prescribed medical treatment or therapy that is necessary to control disabling condition. This includes treatments and institutionalities.</td>
</tr>
<tr>
<td>Other Items and Services</td>
<td>Assistive technology that people with disabilities use for employment-related purposes such as software applications, computer support services, and special tools which have been specifically designed to accommodate the person’s impairment.</td>
</tr>
</tbody>
</table>

**IRWE Example:**
Mr. Smith receives SSDI benefits due to blindness. He works and earns $2,100 gross a month. He has the following work expenses:
- Pays $125 a month for union dues and insurance;
- Pays $75 a month for heart medication; and
- Pays $350 a month to a special transportation service needed to get to and from work due to disabling condition.

Although Mr. Smith has expenses of $550 a month, only the $350 of his earnings for the special transportation service are related to his impairment and not counted in determining the amount of his SSDI benefit as follows: (Normally, public transportation is not an IRWE.)

$2,100 - $350 (impairment-related work expense) = $1,750 (below the 2021 blind SGA amount of $2,190)
**What is a subsidy?**

- A “subsidy” is support provided by your employer that may result in you receiving more pay than the actual value of the services you perform.

**What are special conditions?**

- “Special conditions” refer to support and on-the-job assistance provided by your employer, or by someone other than your employer, for example, a vocational rehabilitation agency. Because of this support, you may receive more pay than the actual value of the services you perform.

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**Unsuccessful Work Attempt (UWA)**

An Unsuccessful Work Attempt (UWA) is an effort to do work, in employment or self-employment, which you stopped or reduced to below the SGA level after a short time (within 6 months) because of:

- your impairment,
- removal of special conditions related to your impairment that you needed to help you work.

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**Form SSA-821: Work Activity Report**

SSA-821 is used to document work activity and work incentives when SSA is making SGA decisions.

Beneficiaries complete this form to document Special conditions, Subsidies, and IRWEs so decisions are based on the real value of the work.
What is EXR?
EXR is your safety net if your cash benefits end because of your work. If you make less money or you have to stop working because of your disability, you may be able to restart your benefits right away if:
- you stop working above the SGA level, and
- your disability is the same as or related to your current disability, and
- you make your request within 5 years of when your benefits end.

How does EXR help you?
The EXR provision allows you to receive up to 6 months of temporary cash benefits while we conduct a medical review to decide if we can reinstate your benefits. You may also be eligible for Medicare and/or Medicaid during this provisional benefit period.

What is a PASS?
A PASS is a plan for your future that allows you to use your income or resources to help you reach your work goals. For example, you could set aside money to go to school to get specialized training for a job or to start a business.

A PASS may benefit you if:
- You want to work.
- You get SSI (or can qualify for SSI by having this plan) because you’re disabled or blind.
- You have other income and/or resources to use to pursue a job or start a business.

The objective of a PASS is to help disabled individuals find employment that reduces or eliminates SSI or SSDI benefits.

What kinds of expenses can a PASS help pay for?
- School or training expenses - tuition, fees, books, and supplies
- Uniforms, special clothing, safety equipment, tools
- Attendant care of child care expenses
- Transportation for work
- Employment services such as a job coach
- Supplies or equipment to start a business
Plan to Achieve Self-Support (PASS)

Example: SSDI excluded under an approved PASS

• Maria wants to go to school and become a paralegal.
• She receives $800 in SSDI benefits.
• Maria’s employment goal needs to be expected to generate enough income to eliminate SSDI - (have expected earnings over $1,310 per month SGA for 2021).
• Maria determines she needs $780 per month for tuition, books, and school supplies. We can deduct the $760 in school expenses from her SSDI benefit and deduct the remaining $20 (general exclusion) so that her SSDI benefit is not countable income and she is eligible for the full SSI payment of $784 (for 2021).
• Maria must use the SSI payment of $784 for living expenses and use the PASS funds of $780 for approved plan expenses.

Ticket to Work (TTW)

• A Ticket provides access to free employment services, vocational rehabilitation (VR) services, and other support services you may need to get or keep a job.
• It is a free and voluntary service.
• No Medical review while your ticket is “In Use”
• Call the Ticket to Work Helpline at 1-866-YOURTICKET (866-968-7842) (TTY 1-866-833-2967), or go online at: www.chooseworkttw.net

Responsibilities When Beneficiary Returns to Work

Notify Social Security of any changes in work activity:
• Start or stop work;
• Work has been reported but duties, hours, or pay have changed;
• Start paying for expenses that are needed to work due to the disability.

Report changes in work activity by phone, fax, or mail.
Call 1-800-772-1213 between 8 a.m. and 7 p.m. Monday-Friday, TTY 1-800-325-0778.
For SSDI and SSI recipients, you can report wages through:

- your personal my Social Security account;
- calling a field office;
- mailing/faxing the information; or
- calling the Teleservice Center.

Note: SSI recipients can also report wages via the mobile wage reporting application and the telephone wage reporting service.

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**myWageReport (myWR)**

- Available behind the my Social Security account portal
- Automated wage reporting application for SSDI, SSI, and concurrent beneficiaries
- Rep Payee and SSI deemors may use this app
- Reporters using this tool provide information from individual pay stubs
- Once entered, the information is passed on to the SSDI and SSI systems
SSI Mobile Wage Reporting (SSIWMR)

- Allows individuals to report monthly wages using mobile smartphone technology
- Accepts monthly wage reports from both SSI-only and concurrent recipients, rep payees and deemors
- Accepts wage reports for a prior month on any day during the current reporting month

SSI Telephone Wage Reporting (SSITWR) 1-866-772-0953

- Automated monthly wage reporting system
- Allows recipients, their representative payee, and deemors to call a toll free number to report the prior month's gross wages: 1-866-772-0953
- Accepts wage reports submitted for the prior month on any day during the current reporting month
- A successful wage report results in the gross wage amount automatically posting to the SSI claims system
my Social Security Services

If you receive benefits or have Medicare, you can:
- Opt out of mailed notices for those available online;
- Request a replacement Social Security card if you meet certain requirements;
- Report your wages if you work and receive Disability Insurance (SSDI) and/or Supplemental Security Income (SSI) benefits;
- Get a benefit verification letter as proof that you are getting benefits;
- Check your benefit and payment information and your earnings record;
- Change your address and phone number;
- Start or change direct deposit of your benefit payment;
- Submit your advance designation of representative payee request;
- Request a replacement Medicare card; and
- Get a replacement SSA-1099 or SSA-1042S for tax season.

ssa.gov/myaccount/what.html

my Social Security Services

If you do not receive benefits, you can:
- View retirement benefit estimates at different ages or dates when you want to start receiving benefits;
- View possible spouse’s benefits;
- Request a replacement Social Security card if you meet certain requirements;
- Check the status of your application or appeal;
- Get a benefit verification letter as proof that you are not getting benefits;
- Get your Social Security Statement to review:
  - Estimates of your future retirement, disability, and survivor benefits;
  - Your earnings once a year to verify the amounts that we posted are correct; and
  - The estimated Social Security and Medicare taxes you’ve paid.

ssa.gov/myaccount/what.html

Advance Designation of Representative Payees

What is it?
- Effective March 2020, Advance Designation of Representative Payees allows you to designate in advance up to three individuals who could serve as a representative payee for you, should the need arise.

Who is it for?
- Adult and emancipated minor applicants and beneficiaries of Social Security or Supplemental Security Income, who do not have a representative payee
Enhanced Security for your my Social Security Account

We recently added a second method to check the identification of account holders when you register or sign in. This is in addition to the first layer of security, your username and password. You will be able to choose either your cell phone or your email address as your second identification method.

Each time you sign in to your account, you will complete two steps:

Step 1: Enter your username and password.
Step 2: Enter the security code we send by text message or email, depending on your choice (cell phone provider text message and data rates may apply).

If a user does not have a text-enabled cell phone, or does not wish to provide their cell phone number, they will need to use their email address as a second identification method instead.

How to Open a my Social Security Account

1. Visit ssa.gov/myaccount
2. Select: “Sign In or Create an Account”
3. Provide some personal information to verify your identity (answer “out of wallet” questions)
4. Choose a username and password
5. Select how to receive a security code every time you access your account (text or email)
my Social Security

You can assist someone in creating a my Social Security account if they:

- are with you;
- have their own email address;
- can answer the "out of wallet" questions; and
- have been appointed a payee.

You cannot create a my Social Security account on behalf of another person by using another person's information or identity, even if you have that person's written permission. For example, you cannot create an account for another person:

- with whom you have a business relationship;
- for whom you are a representative payee; or
- for whom you are an appointed representative.

my Social Security

You can visit your local field office to obtain a unique activation code.

You will need to bring in proof of identity in one of the following forms (must be current):

- State driver’s license or identity card;
- U.S. passport or passport card;
- U.S. military identification; or
- U.S. government employee identification card.