

# Social Security and SOAR Spotlight Series: Post-Eligibility Issues and More

October 21, 2020

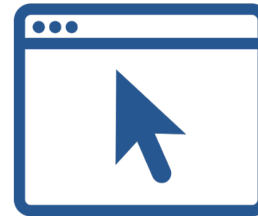
# Webinar Information



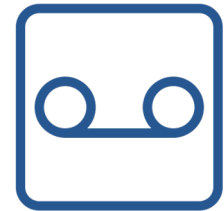
All participants lines are muted.



Use the questions feature in the GoToWebinar control panel to submit questions.



This webinar will be posted to COHHIO's website.



This webinar is being recorded.

# SSA Disclaimer

- The information presented in this webinar is accurate and effective as of calendar year 2020
- Participation in this presentation does not constitute an endorsement by the Social Security Administration (SSA) or its employees of the organizations and information and products not provided by SSA.





# What is SOAR?



SOAR stands for SSI/SSDI Outreach, Access, and Recovery.



SOAR is for people who are experiencing or at-risk of homelessness .



SOAR is a model for assisting individuals to apply for Social Security disability benefits.



SOAR has been sponsored by SAMHSA in collaboration with SSA since 2005.



50 states are currently participating.

# Why is SOAR Important?



The SSA application process is often overwhelming and time consuming.



People experiencing homelessness are often denied for reasons unrelated to their disability or lack thereof.



SOAR provides access to housing and healthcare, increasing the likelihood of stability for anyone at-risk or experiencing homelessness.



SOAR decreases the chances of homelessness for those exiting institutions.

**Interested in learning more about SOAR Ohio  
and becoming SOAR certified? Reach out.**

Amy Lamerson, MSW

SOAR Ohio and HNHF Director

SOAR Ohio State Lead

**COHHIO**

175 S. Third Street, Suite 580

Columbus, OH 43215

P: 614.280.1984 ext. 128 F: 614.463.1060

[amylamerson@cohhio.org](mailto:amylamerson@cohhio.org)

Website: <https://cohhio.org/programs/soar-ohio/>



## SOAR Disability Spotlight Series: Part 2 – Post Eligibility Events



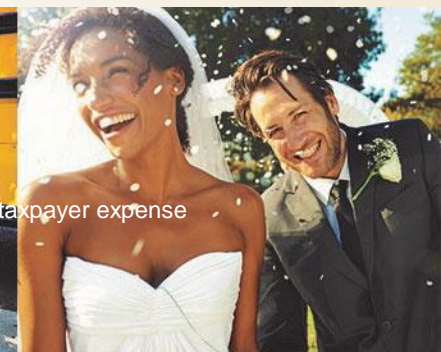
Theresa Busher  
Public Affairs Specialist  
Dayton  
[theresa.busher@ssa.gov](mailto:theresa.busher@ssa.gov)



Kelly Draggoo  
Public Affairs Specialist  
Cincinnati  
[Kelly.draggoo@ssa.gov](mailto:Kelly.draggoo@ssa.gov)



Produced at U.S. taxpayer expense







Securing today  
and tomorrow

# Contacting Social Security

⚠️ Coronavirus (COVID-19) Updates ⚠️

**Call 1-800-772-1213**

**Representatives from 8am to 5:30pm, Monday through Friday. Information is provided by automated phone service 24 hours a day.**

**Local Offices – Not Open to In-Person Service due to COVID-19**

**Use [www.socialsecurity.gov/locator](http://www.socialsecurity.gov/locator) to obtain the local office phone number for cases of dire, urgent need. Local hours 9am to 4pm weekdays.**

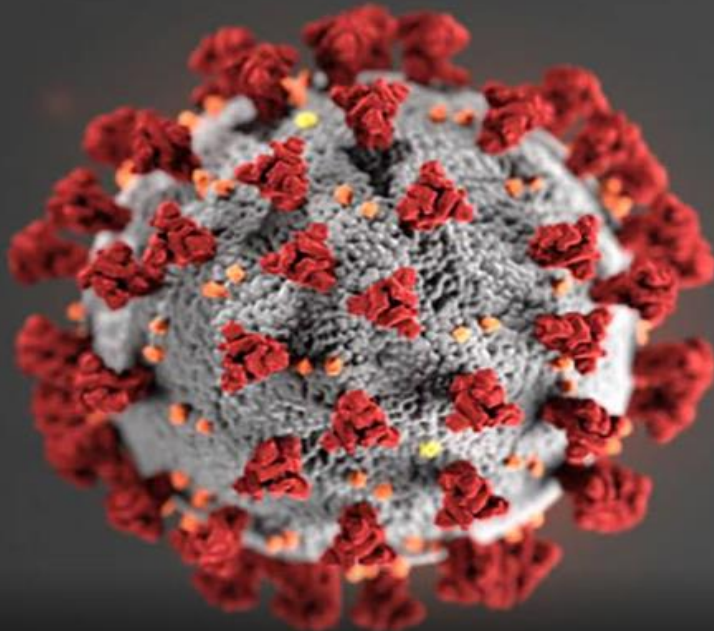
**Get Updates at [www.socialsecurity.gov/coronavirus](http://www.socialsecurity.gov/coronavirus)**

- **Benefits are being paid timely for retirement, disability, survivors, and SSI.**
- **For COLA updates, see [www.ssa.gov/cola](http://www.ssa.gov/cola)**
- **Beware of letters or calls threatening Social Security payment stoppage due to COVID, it is a scam!**

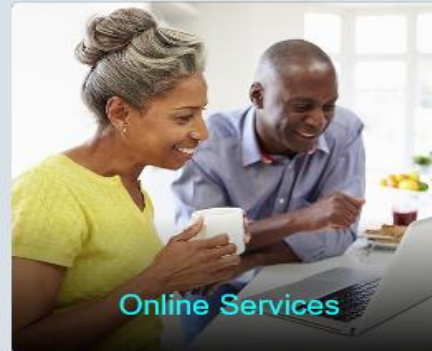


Securing today  
and tomorrow

**SocialSecurity.gov**



Coronavirus (COVID-19) Impact - Read More



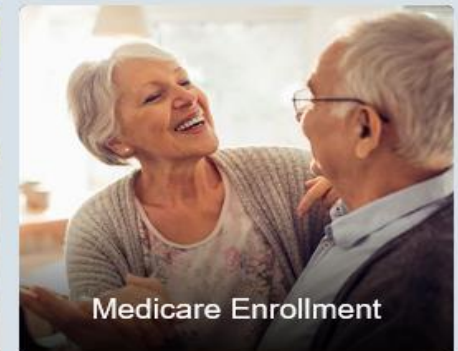
Online Services



Retirement



Disability



Medicare Enrollment



### my Social Security

Check out your *Social Security Statement*, change your address & manage your



### Social Security Number

Your Social Security number remains your first and continuous link with Social



### Retirement Estimator

Calculate your benefits based on your actual Social Security earnings record.



### FAQs

Get answers to frequently asked questions about Social Security.



Securing today  
and tomorrow

SocialSecurity.gov



# Using Your **my**SocialSecurity Account

**Not getting Social Security yet? You can -**

- **View your online *Social Security Statement* and earnings record**
- **Check application status**
- **Order a replacement Social Security card**

**If you get Social Security benefits, you can—**

- **Get your benefit verification letter;**
- **Change your address and phone number; and**
- **Start or change your direct deposit**
- **Get a replacement Medicare card or 1099**

**If you are the Representative Payee for a beneficiary, you can-**

- **Report monthly wages**
- **Complete annual accounting**
- **View/print proof of benefits**
- **Update or enroll in direct deposit**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# SSI vs SSDI – Session 1 Review

Social Security Disability Insurance	Supplemental Security Income
AKA SSD, Regular Disability, RSDI <ul style="list-style-type: none"><li>• Check arrives on the 3<sup>rd</sup> or Wednesday</li><li>• Dependent benefits may be payable</li></ul>	SSI <ul style="list-style-type: none"><li>• Check arrives on the 1st</li></ul>
Payments are based on a person's earnings.	SSI payments are not based on work.
Is “insurance” that you earn through paying FICA taxes on your work.	Needs-based public assistance program that does not require a person to have work history.
Is not based on your income, resources, living arrangement – nor your spouse's.	No work needed. Based on limited income, resources, and living situation.
Leads to Medicare	Leads to Medicaid



Securing today  
and tomorrow

SocialSecurity.gov





# The Representative Payee Program



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Types of Representative Payees

## Individual

- **Single person whom the beneficiary recommends or trusts to manage benefit.**
- **Cannot charge a fee.**

## Organizational

- **Community organization which provides care or services for beneficiaries.**
- **May charge a fee, but ONLY with SSA authorization.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



## Organizational Payee – Fee Information

- **Must complete Fee-For-Services request paperwork, see details at [www.ssa.gov/payee](http://www.ssa.gov/payee).**
- **Proof of organization bond insurance and licensure are also required.**
- **In 2020 - SSA approved fees = \$44/month in 2020. That amount can be up to \$83/month if the beneficiary has an SSA determined drug or alcohol secondary disabling condition.**
- **SSA may ask for annual re-certification and reviews.**



Securing today  
and tomorrow

[SocialSecurity.gov](http://SocialSecurity.gov)



# Power of Attorney (POA)/Legal Guardians

- **Having power-of-attorney, being legal guardian or co-owning a joint bank account with a beneficiary is NOT the same as being a representative payee.**
- **Social Security representative payee is not entitled to manage any funds that aren't Social Security or SSI payments.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# Local Offices Determine if a Payee is Needed

- **For initial claims: cases flagged when disability approved for issues of potential mental “incapability”.**
- **Direct payment is assumed for all adults. Normally children under age 18 must have a Representative Payee.**
- **Adults with mental impairments (including substance abuse) who need assistance handling benefits and personal finance will need a payee:**
  - **Legal Guardian or Family member is preferred.**
  - **Organization may be more suitable than family/friend in some situations.**
  - **Payee Applicant must visit a local Social Security office.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Applying to be a Representative Payee

- An in-person interview is required for all individual payee applications. **COVID process – we can do a telephone application.**
- Organizational applications will also have a **PHONE** contact for each case.
- A contact **MUST** be made for every rep payee application, even for a facility!
- All payee applicants complete the payee application with the local office. This is not an online form!



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Requests Involving a Change of Payee

## Social Security will:

- **Contact current payee for his/her views about change.**
- **Investigate allegations raised about current payee's suitability to serve.**
- **When we choose a payee, we have a “preference list” similar to what the Courts use with guardianship:**
  - **Family is first choice**
  - **Organizations, second.**
- **It is a case-by-case determination.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



## Others Forms with Payee Applications: SSA-787

### **SSA-787 – *Physician's/Medical Officer's Statement of Patient's Capability to Manage Benefits***

- Not necessary if beneficiary already has a payee.
- SSA will send this form directly to the beneficiary's medical source, and it must be returned to us from this source.
- We will not accept 787s which appear to be mass produced or fail to explain the incapability.
- Note: SSA makes the capability determination, not this form.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# Once a Change of Payee is Made

## Social Security will:

- **Send notice to current payee explaining change.**
- **Send Advance Notice (with appeal rights) to beneficiary explaining SSA's payee selection.**
- **Prior payee is asked to return any saved funds or benefits to SSA.**
- **Note: Typically, this process takes 4-8 weeks from start to finish. We can suspend benefits if a fraud allegation is made regarding the current payee, but again – we will determine if benefit suspension applies to each individual case.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



## Representative Payees and **mySocialSecurity**

- Individual payees can access beneficiary information online by using their OWN **mySocialSecurity** account.
- The payee can monitor benefits and submit wage reporting for the beneficiary.
- **NEW:** if you get a Social Security benefit, you can make an “Advanced Designation of Payee” for yourself in the case that you become incapacitated! Note-you cannot do this for the beneficiary, it is only for your own benefit.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Individual Representative Payee Accounting

- **Complete Annual Accounting of:**
  - Amount spent on beneficiary's basic needs and personal items.
  - Amount saved, if any.
- **Exempted from Accounting: spouse or parent with beneficiary in same household.**
- **Submit by Mail or via *my*SocialSecurity.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Organizational Payee Accounting

- All organizational payees are strongly encouraged to complete payee reporting online via “internetRepPayeeAccounting” = iRPA.
- Organization must register for online access, allowing them to complete the accounting request online at [www.ssa.gov/payee/form/index.htm](http://www.ssa.gov/payee/form/index.htm) .



Securing today  
and tomorrow

SocialSecurity.gov





# Misuse of Beneficiary Benefits

- Occurs when money is not spent on beneficiary or saved for future needs.
- SSA decides if misuse has occurred, and makes a misuse determination. Ex:
  - Use of beneficiary's benefits for rep payee's own personal expenses
  - Put beneficiary funds in rep payee's or another person's account
  - Keep conserved funds after no longer rep payee
  - Charge beneficiary for services unless authorized by SSA



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# If Social Security Uncovers Payee Misuse

## Social Security may:

- Appoint a new payee, or
- Make direct payment to beneficiary, and
- Obtain restitution from misuser, and
- Refer case to Office of the Inspector General (OIG) for possible criminal prosecution.
- SSA will initiate action to recover misused funds.

You can make a confidential report of benefit misuse online at <https://oig.ssa.gov/report> .



Securing today  
and tomorrow

SocialSecurity.gov



# www.socialsecurity.gov/payee

## When People Need Help Managing Their Money

### [Representative Payee Home](#)

#### [Organizational Payee](#) ▼

#### [Individual Payees](#) ▼

#### [Beneficiary Information](#) ▼

#### [More Information](#) ▼

**\*NEW\***

#### [Representative Payee Interdisciplinary Training](#)

#### [CFPB Consumer Advisory: 3 pension advance traps to avoid](#)

#### [Consumer Finance: Planning for Financial Decisions as You Age](#)

Social Security's Representative Payment Program provides financial management for the Social Security and SSI payments of our beneficiaries who are incapable of managing their Social Security or SSI payments. If you are concerned that someone you know becomes incapable of managing or directing the management of his or her benefits, please call us at 1-800-772-1213 (TTY 1-800-325-0778) to request an appointment to discuss your concerns.

Generally, we look for family or friends to serve as representative payees.

When friends or family are not able to serve as payees, Social Security looks for qualified organizations to be representative payees.

If you are a representative payee, you can complete the Representative Payee Accounting Report online. You must be 18 or older to complete the Representative Payee Accounting Report online. If you are under 18 and a representative payee, you must complete the paper Representative Payee Report form you received in the mail and return it to the address indicated on the form.

**Complete your payee  
accounting online**

## More Information

### [Payee Publications](#)

Frequently Asked Questions  
for:

- [Representative Payee](#)
- [Beneficiaries who have a Payee](#)
- [Representative Payees  
Completing  
Accounting Online](#)

## Payee Accounting

[Complete your payee  
accounting online](#)

### [Contact Us](#)



Securing today  
and tomorrow

SocialSecurity.gov



# Overpayments



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# Overpayment Notices

- If a client is paid more than they are due, Social Security will send an overpayment notice (to the individual or payee).
- The notice should explain how and why the overpayment occurred.
- Appeal rights are explained in the notice – as with a medical denial, a person has 65 days from the notice to appeal the overpayment determination.
- We do not collect an overpayment while an appeal decision is pending.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Appeals vs Waiver Request

## Appeal

- You don't agree with our determination or think the information used to make the determination was incorrect.
- Must be filed 65 days after the notice is sent.

## Waiver

- You don't feel the overpayment is your fault, and
- Paying it back would cause financial hardship or be unfair.
- No time limit to file a waiver.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



## **Filing an Appeal [www.ssa.gov/forms/ssa-.html](http://www.ssa.gov/forms/ssa-.html)**

- **You can file a non-medical appeal online!**
- **You can also download and complete SSA-561 from the same link above and fax it to a local office (or mail it).**
- **Or you can call us and a rep will intake the SSA-561 information and send the form out for completion.**
- **Reminder: a reconsideration is disputing the facts of our determination. Ex: My wage amount was input incorrectly.**



Securing today  
and tomorrow

[SocialSecurity.gov](http://SocialSecurity.gov)



## **Filing a Waiver [www.ssa.gov/forms/ssa-632.html](http://www.ssa.gov/forms/ssa-632.html)**

- **You can download the waiver form from the link above and fax it to a local office (or mail it).**
- **Or call us and a rep will send the form out for completion.**
- **Reminder: a waiver isn't disputing the facts of the overpayment, it's disputing fault and that a person cannot pay it back – or shouldn't have to pay it back.**
- **Waivers can be filed at any point in time.**



Securing today  
and tomorrow

[SocialSecurity.gov](http://SocialSecurity.gov)





## Local Offices Intake the Appeal or Waiver Form

- **Local offices will process the appeal or waiver request. However, the final appeal determination may be made at a processing center.**
- **Again, collection is stopped until a decision is made on the overpayment or waiver.**
- **If we determine the individual is at fault and must repay the overpayment amount, the individual can appeal that determination.**
- **Ex: A reconsideration denial can be appealed to the hearings level.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



## If Overpayment Is Upheld

- **SSI collection cannot exceed 10% of the maximum SSI federal rate. For 2020 – \$78.30.**
- **For SSDI, we withhold full benefit checks. However, a person can request to hold a partial amount from the SSDI.**
- **Download form SSA-634 from [www.ssa.gov/forms](http://www.ssa.gov/forms) to ask for a change in the withholding rate.**
- **The individual will receive billing statements if not receiving a benefit.**



Securing today  
and tomorrow

[SocialSecurity.gov](http://SocialSecurity.gov)

# Disability Work Incentives



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Working While Receiving SSI and/or SSDI



Securing today  
and tomorrow

## 2018 Red Book

A Summary Guide To Employment Supports For  
Persons With Disabilities Under The Social Security  
Disability Insurance (SSDI) and Supplemental  
Security Income (SSI) Programs

The Red Book is available at: <https://www.ssa.gov/redbook>



Securing today  
and tomorrow

SocialSecurity.gov





# Terminology

## Ticket to Work

- **Opened up FREE options for beneficiaries to obtain employment services, vocational rehabilitation (VR) services, benefit planning and other employment support services.**
- **Beneficiaries use a “Ticket” when they use these support services, but there is no penalty or mandate.**

## Work Incentives

- **SSA rules that help beneficiaries keep benefits as they explore work.**
- **AKA Employment Supports**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# SSI Work Incentives – Some Highlights

- **Earned Income Exclusion and Full Medicaid**
- **Student Earned Income Exclusion (SEIE)**
- **SSI and 1619 Medicaid**
- **IRWEs**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Earned Income Exclusion

- **All work must be reported monthly to SSI. The monthly SSI payment is determined based on monthly gross wages, so it may change each month depending on gross earnings.**
- **However -SSA does not count the first \$65 of the earnings received in a month, plus one-half of the remaining earnings.**
- **We apply this exclusion in addition to a \$20 general income exclusion (which applies first to any unearned income).**
- **Under 1619(a) and 1619(b) Medicaid provisions, full Medicaid normally continues with SSI and work.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





## Example of SSI and Monthly Earned Income

**SSI recipient earns \$1000 in gross wages in Jan 2020**

- **$\$1000 - 20$  (general income exclusion) =  $\$980$**
- **$\$980 - \$65$  (earned income exclusion) =  $\$915$**
- **$\$915 / 2 = 457.50$  is countable earned income**
- **$\$783 - \$457.50 = \$325.50$  SSI amount for March 2020.**
- **SSI income changes affect check 2 months later.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# SSI Student Income Exclusion

If you are under age 22 and regularly attending school, we do not count up to \$1,900/month in wages. The maximum yearly exclusion for 2020 = \$7,670.

## “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.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Impairment Related Work Expenses (IRWE)

- **SSA deducts the cost of certain impairment-related items and services that are needed for employment from gross earnings when look at the monthly SGA level, or for what is counted when figuring the SSI amount.**
- **IRWEs must be related to the disability and paid for out of pocket by the beneficiary.**
- **Example: Beneficiary is earning \$1280.00 per month in gross wages. His monthly co-pay for his medications is \$80.00.**
- **$\$1280 - \$80 = \$1200$ . This is countable income SSA will use when determining SGA and/or SSI amount.**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# IRWE Examples

Type of Expense	Example
Transportation Costs	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.
Attendant Care Services	Services performed in the work setting. Services performed to help prepare for work, the trip to and from work and after work.
Service Animals	Expenses paid in owning a guide dog or other service animal that enables beneficiary to overcome functional limitations in order to work.
Medical Devices	Deductible devices include wheelchairs, dialysis equipment, pacemakers, respirators, traction equipment, and braces.
Prosthesis	Artificial hip, artificial replacement of an arm, leg, or other parts of the body.
Residential Modifications	Employed outside of home - modifications to exterior to permit access to the street or transportation. Self-employed at home - modifications inside to create workspace to accommodate impairment.
Prescription Drugs	Regularly prescribed medical treatment or therapy that is necessary to control disabling condition. This includes co-payments and insurance deductibles.
Other Items and Services	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



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



## SSI and Medicaid While Working – 1619(b)

- With 1619 (b), Medicaid coverage can continue, even if earnings become too high for an SSI cash payment:
- No application is needed; 1619(b) is applied with wage inputs on the SSI record.
- Normally, if a client is ineligible for SSI and/or Medicaid for any reason other than work or medical recovery, SSA may be able to restart SSI cash payments and/or Medicaid coverage within 12 months without a new application.
- But with 1691b Medicaid provisions, an SSI recipient's record can be kept active beyond 12 months. If work ceases, we may be able to restart benefits without a new claim.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# SSDI Work Incentives – Included DAC Beneficiaries

- **Trial Work Period (TWP)**
- **Extended Period of Eligibility (EPE)**
- **Subsidy and Special Conditions**
- **IRWEs**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# SSDI Trial Work Period (TWP)

- Allows SSDI beneficiaries to test their ability to work by earning as much as they would like for a total of 9 months – they don't have to be consecutive.
- Cannot use TWP before the disability is approved.
- Full SSDI benefit continues regardless of earnings during the TWP.
- In 2020, gross earnings of \$910+/month or more than 80 hours of self employment, are considered TWP months.
- We do not apply other work incentive rules during the TWP.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# SSDI Extended Period of Eligibility (EPE)

- The EPE begins the month after the Trial Work Period (TWP) ends, even if the client stops working after the 9 months.
- The first 36 months of the EPE is a “re-entitlement period”:
  - For months where monthly gross earnings are below SGA = entire SSDI benefit is payable;
  - For months where work or monthly earnings are above SGA = entire benefit is suspended.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# EPE: Monthly SGA Amount Is the Key

- **SGA Amount in 2020 = \$1260 gross per month.**
- **Benefits can stop/start throughout the 36 month EPE, depending on if earnings are above or below SGA – entire SSDI benefit is paid, or is suspended.**
- **After the 36 month EPE is finished:**
  - **As long as all monthly benefits are UNDER SGA monthly amount, benefits will continue.**
  - **ANY month after the EPE where earnings are over the SGA limit will lead to the terminate benefits.**
  - **In that case, an individual must reapply for disability!**
  - **More on the expedited process in a moment....**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# SSDI - Subsidy/Special Conditions and SGA

- A “subsidy” is support provided by an employer that may result in the client receiving more pay than the actual value of the services you perform.
- “Special conditions” refer to support and on-the-job assistance provided by an employer or 3<sup>rd</sup> party (ie-VA program, job coach, Voc Rehab, etc).
- SSA may determine that the individual only does 50% of duties that position would entail without subsidy/special conditions. We adjust the amount of earnings based on this information.



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# Verifying Subsidy/Special Conditions

- Once the beneficiary completes the Trial Work Period and has a work review, SSA will verify allegations of Subsidy and/or Special Conditions with the employer.
- Employers are asked to complete form SSA-3033, found online at [www.ssa.gov/forms/ssa-3033.pdf](http://www.ssa.gov/forms/ssa-3033.pdf).
- SSA cannot accept a “blanket subsidy letter” – the form must be completed for each individual.
- Ex: my son works as a store bagger. The normal bagger position has 4 duties – bagging, price check, cart return, and stocking. My son only bags, he has a 75% subsidy. His \$1500 gross wages this month are counted as \$375, below SGA. He will thus receive his full SSDI benefit.



Securing today  
and tomorrow

[SocialSecurity.gov](http://SocialSecurity.gov)



# IRWEs - Also Apply to SSDI SGA Determination

Type of Expense	Example
Transportation Costs	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.
Attendant Care Services	Services performed in the work setting. Services performed to help prepare for work, the trip to and from work and after work.
Service Animals	Expenses paid in owning a guide dog or other service animal that enables beneficiary to overcome functional limitations in order to work.
Medical Devices	Deductible devices include wheelchairs, dialysis equipment, pacemakers, respirators, traction equipment, and braces.
Prosthesis	Artificial hip, artificial replacement of an arm, leg, or other parts of the body.
Residential Modifications	Employed outside of home - modifications to exterior to permit access to the street or transportation. Self-employed at home - modifications inside to create workspace to accommodate impairment.
Prescription Drugs	Regularly prescribed medical treatment or therapy that is necessary to control disabling condition. This includes co-payments and insurance deductibles.
Other Items and Services	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



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)



# How to Report Wages

**For SSDI and SSI recipients, report wages with:**

- The **mySocial Security** account – representative payees can also report wages for adult beneficiaries through their OWN **mySocial Security** account;
- visiting/calling a local office;
- mailing/faxing the information; or
- calling the 800#.

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



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)





# When Should You Report Work Incentives

## For SSI

- Report any and all work as soon as employment begins - call local representative to report any IRWEs and/or Student Income Exclusion as soon as work starts.

## For SSDI:

- Work incentives should be reported once SSA conducts a “Continuing Disability Work Review”, which is after the Trial Work Period.
- The SSA-821 Work Report is how we capture allegations of work incentives! [www.ssa.gov/forms](http://www.ssa.gov/forms). Reminder: the employer is sent the SSA-3033 for subsidy info.



Securing today  
and tomorrow

SocialSecurity.gov



# SSA-821 Work Activity Report

Yes	Special Condition	Employer Name	(MM/YYYY to MM/YYYY)	Please Describe
<input type="checkbox"/>	Had extra help, extra supervision or a job coach			
<input type="checkbox"/>	Worked irregular or fewer hours than other workers			
<input type="checkbox"/>	Given special equipment because of my condition			
<input type="checkbox"/>	Took more rest periods than other workers			
<input type="checkbox"/>	Given special transportation to and from work			

**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.**

**7. Do or did you spend any of your own money for items or services related to your physical and/or mental condition(s) that you needed in order to work and for which you did not get reimbursed? (For example; medicines or co-pays, medical devices or procedures, Braille equipment, special telephone or equipment, service animal, attendant care, modifications to a car used for work, or other special transportation.) We may ask you for proof of payment.**

- ☐ **NO.** I did not spend any of my own money for items or services related to my physical and/or mental condition.
- ☐ **YES.** Please tell us what you paid below. Do not show any expenses that have been or will be paid by an insurance company, other organization, or other person.

Describe Item or Service	Cost	Date Paid (MM/YYYY-MM/YYYY)
Example: <i>Service animal</i>	<i>\$100 per day, week, month, or year</i>	<i>01/2000 - 02/2000</i>
	\$ _____ per _____	



Securing today and tomorrow

SocialSecurity.gov



Securing today  
and tomorrow

# Work Resources

- **Work Info:** [www.socialsecurity.gov/redbook](http://www.socialsecurity.gov/redbook) .
- **Work Incentives Summary:**  
[www.socialsecurity.gov/disabilityresearch](http://www.socialsecurity.gov/disabilityresearch) and  
click “work incentives policy” .
- **FREE “WIPA”** for work and benefits planning  
beyond Social Security – see map and contacts  
at [https://www.disabilityrightsohio.org/benefits-](https://www.disabilityrightsohio.org/benefits-counseling)  
[counseling.](https://www.disabilityrightsohio.org/benefits-counseling)
- **Faces of Disability** [www.ssa.gov/disabilityfacts.](http://www.ssa.gov/disabilityfacts)



Securing today  
and tomorrow

SocialSecurity.gov



## Ohio SSA Public Affairs Team

### **Dayton**

**Theresa Busher**

[theresa.busher@ssa.gov](mailto:theresa.busher@ssa.gov)

### **Cincinnati**

**Kelly Draggoo**

[kelly.draggoo@ssa.gov](mailto:kelly.draggoo@ssa.gov)

**Columbus – Kelly/Theresa**

### **Cleveland**

**Brandon Smith**

[brandon.smith@ssa.gov](mailto:brandon.smith@ssa.gov)

### **Toledo**

**Erin Thompson**

[erin.thompson@ssa.gov](mailto:erin.thompson@ssa.gov)

### **Akron**

**Robert Fenn**

[robert.fenn@ssa.gov](mailto:robert.fenn@ssa.gov)



Securing today  
and tomorrow

**SocialSecurity.gov**





# Stay In the Loop with Social Security Info

- **Follow our blog “Social Security Matters” at <https://blog.ssa.gov>.**
- **Official [facebook/twitter/Instagram/YouTube/LinkedIn](https://www.ssa.gov/socialmedia) links at [www.ssa.gov/socialmedia](https://www.ssa.gov/socialmedia).**
- **Pandemic service updates at [www.ssa.gov/coronavirus](https://www.ssa.gov/coronavirus).**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.ssa.gov)



**Thank You!**



Securing today  
and tomorrow

[SocialSecurity.gov](https://www.SocialSecurity.gov)