

Social Security and SOAR Spotlight Series: The Disability Application Process

Wed, October 14, 2020

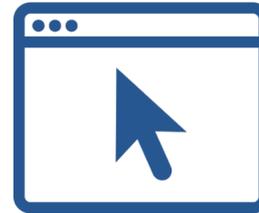
Webinar Information



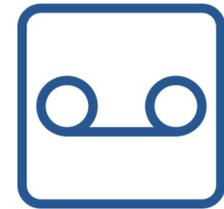
All participants lines are muted.



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.**

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Social Security and SOAR Spotlight Series: The Disability Application Process



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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 to obtain the local office phone number for cases of dire, urgent need. Local hours 9am to 4pm weekdays.

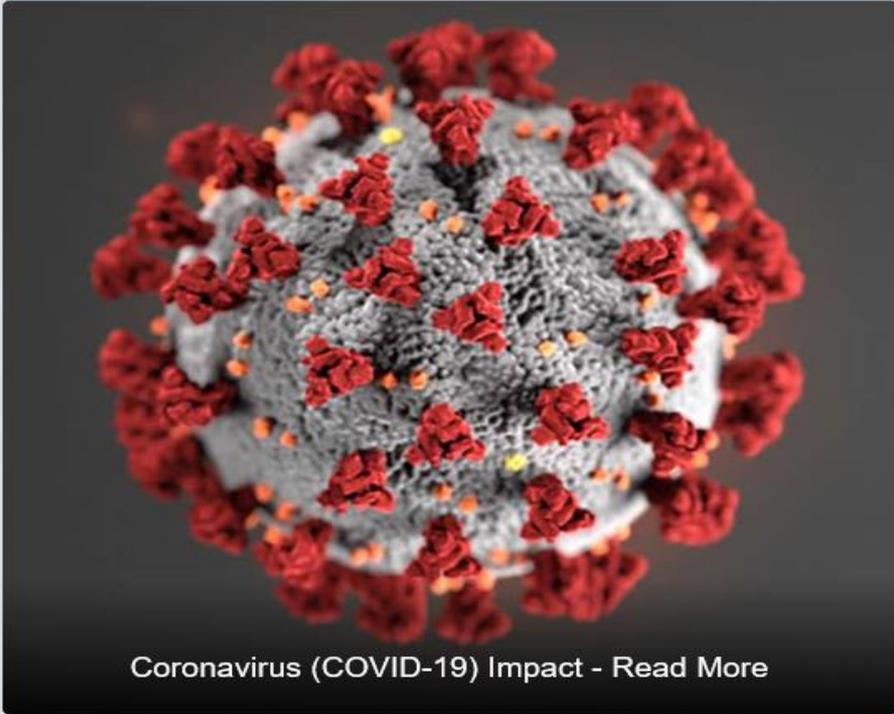
Get Updates at www.socialsecurity.gov/coronavirus

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



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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.

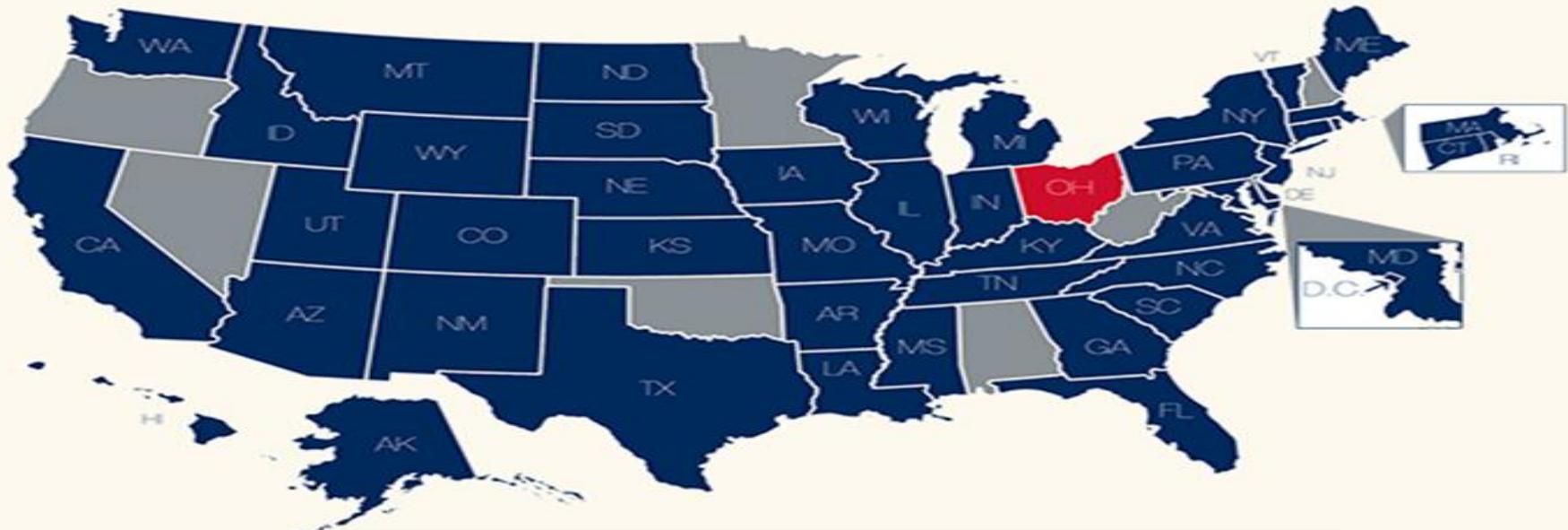


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Great News, Ohio!

**Need a replacement Social Security card?
Request one online.**



Request yours today!

**Online replacement card services
are available in all highlighted areas.**



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Creating Your *my*SocialSecurity Account

Once you create the online account, you can reset/retrieve your User Name and/or Password online – self service!

Coming Soon: If you are unable to create an account online, you can **call** a local Social Security office to obtain an “Activation Code” –you must have the following with you when you call:

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

Note: a 3rd party **CANNOT** obtain a registration code for another individual.



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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**



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Disability Programs

Title II

SSDI
Social
Security
Disability
Insurance

Medicare

Title XVI

SSI
Supplemental
Security
Income

Medicaid



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ssr.gov



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Social Security's Definition of Disability

- A medical condition or combination of impairments preventing substantial gainful activity (SGA) for at least 12 months, or expected to result in death.
- SGA in 2020 = \$1260 or more in gross wages per month (\$2100 if blind).
- SGA in 2021 = \$1310/month (\$2190 if blind).
- Everyone 18+ is under this definition, even if remaining in high school through 22.



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Social Security's Definition of Disability - Child

- A child must have severe and marked limitations in at least 2 “domains” as compared to other children of the same age w/o impairments.**
- Domains = Acquiring/Using Information, Attending and Completing Tasks, Interacting/Relating with Others, Moving About and Manipulating Objects, Caring for Self, Health and Physical Well Being.**
- If receiving as a child, a new medical decision is made at 18 with adult criteria.**



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SSI vs SSDI – An Overview

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



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SSDI – aka Social Security Disability



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SSDI Essentials

- **Paid on the 3rd of the month or a Wednesday.**
- **Based on work, not need-must have worked recently to qualify. Rare that children under 18 would have enough work to qualify.**
- **May be retroactive up to one year.**
- **Qualifies you for Medicare after 24 months.**
- **Not need based! Spouse/parent work and other types of income/assets do NOT affect SSDI.**



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SSDI – How Much Work is Needed?

- **Based on credits:**
 - **In 2020, 1 credit = \$1410, 4 credits/year = \$5640.**
 - **In 2021, 1 credit = \$1470, 4 credits = \$5880**
- **Number of credits needed depends on age**
 - **Under 24: 1.5 year of work (6 credits)**
 - **Age 24 – 31: sliding scale**
 - **Over 31: 5 years of work (20 credits) in the 10 years before becoming disabled.**
- **Benefit Amount is average of your monthly work.**



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SSDI – Includes Dependent Benefits for Minor Kids

- Dependents = your children under 18 or 19 if in high school.
- Normally unmarried, and
- No distinction between dependents with or without impairments until age 18.
- Benefits stop at 19 or high school graduation.

*****Parent must be on Social Security OR be deceased for kids to draw*****



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DAC – Disabled Adult Child Benefit, kids age 18+

Disabled Adult Child (DAC) aka Childhood Disability Beneficiary (CDB) = a form of SSDI for adult (age 18+) dependent children.

- Must have a disabling condition that occurred BEFORE age 22. Disability = same definition (ie-not performing work).**
- Normally unmarried, and**
- Parent is deceased or getting Social Security disability/retirement.**



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How Much do Dependents Receive?

- If parent is on SSD or retirement: eligible for up to 50% of worker's monthly benefit.
- If parent is deceased: eligible for up to 75% of worker's monthly benefit amount.
- In both cases, amount all children on worker's record have a "Family Maximum".
- Reminder = parent must be receiving a benefit or be deceased for adult child to qualify. Parents should check in about retirement at age 62.



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When A Dependent Minor Child Turns 18

- If a minor child is getting benefits on a parent's record, Social Security will send form SSA-1372 ("Age 18 Notice") a few months before the child's 18th day.
- The form asks if the child is in high school – if yes, benefits for the child will continue until age 19 OR high school graduation – whichever is earlier.
- The form also states that benefits will continue if the child is disabled and to contact Social Security regarding "Childhood Disability Benefits" (aka DAC).
- A disability application is needed is needed for benefits to continue on the parent record past 18/19!



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SSDI – Medicare Coverage

- **Medicare Part A and Part B coverage automatically begins after being entitled to disability benefits for 24 months.**
- **Entitled = monthly payments begin.**
- **Example: Date of onset is June 2019. Payments start Dec 2019. Medicare A&B will start Dec 2021.**
- **We will send a “Welcome to Medicare” packet several months before your coverage starts.**

Note: People who have permanent kidney failure requiring dialysis or ALS may qualify for Medicare almost immediately.



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Supplemental Security Income (SSI)



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SSI No Payment – First Month

- **SSI is paid to application date (no retro back to age 18, for example).**
- **1st Month of SSI Eligibility = No Payment Month.**
- **Max benefit in 2020=\$783 per month. In 2021, \$794/month.**
- **Based on monthly income, resource limits, and living arrangements.**



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SSI Eligibility - Income

- **Earned income = wages or self-employment.**
- **Unearned income = SSD, VA benefits, unemployment, child support.**
- **Free food/shelter can count as a form of income.**



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SSI Eligibility – Parental Income for Children

- Parental (including step-parent) income counts through the month of age 18, as long as parent/child in the same home.
- Non parental income (ie-grandparents, custodian) doesn't count.
- Income levels depend on type of income and other kids in the home. See www.ssa.gov/ssi for online “Benefit Eligibility Screening Tool” for parents to do their own assessment – or have them call us if they aren't sure!



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SSI Eligibility - Resources

- **Individual limit = \$2000, couple = \$3000.**
- **Resources include**
 - **Cash, bank accounts**
 - **Investments (stocks, bonds, IRAs)**
 - **Life insurance cash surrender value only.**
- **We can exclude a car and home of residence.**
- **STABLE counts excluded up to 100K, see www.stableaccount.com for details.**



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SSI Eligibility – Living Arrangements

SSI benefit amounts may vary depending on where a child or adult lives -

- In someone else's home (including with parents, if over age 18).**
- In group care or supported living.**
- Institutions— you cannot receive SSI for any complete month of residence while incarcerated.**
- SSI = \$30/month if person in medical facility for an entire, continuous month.**



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If On SSI as a Child – Full Review at age 18

- **We will contact the child's payee and intake information to make a new disability determination using the adult rules.**
- **We no longer count the income and resources of parent(s) for eligibility.**
- **We will review the income, resources, and living arrangement info for the 18 year old as an adult individual.**



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The Application Process



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How to Apply for Social Security Disability — Under Age 18

- 1. Complete Social Security medical report at report) at www.socialsecurity.gov/childdisabilityreport.**
- 2. Print confirmation letter for your records**
- 3. Call Social Security at 1-800-772-1213 to schedule an appointment (in office or phone) .**



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How to Apply for Social Security Disability — Age 18+

1. **Complete Social Security Disability Application (included medical report) at www.socialsecurity.gov/disabilityonline.**
2. **Make sure you check “YES” for “Do you intend to file for SSI?” - this creates an SSI application!**
3. **Print confirmation letter for your records**
4. **Option: call Social Security at 1-800-772-1213 to schedule an appointment (in office or phone).**

Note – the month of turning age 18 is the earliest we can process an SSI claim without parental income in the mix.

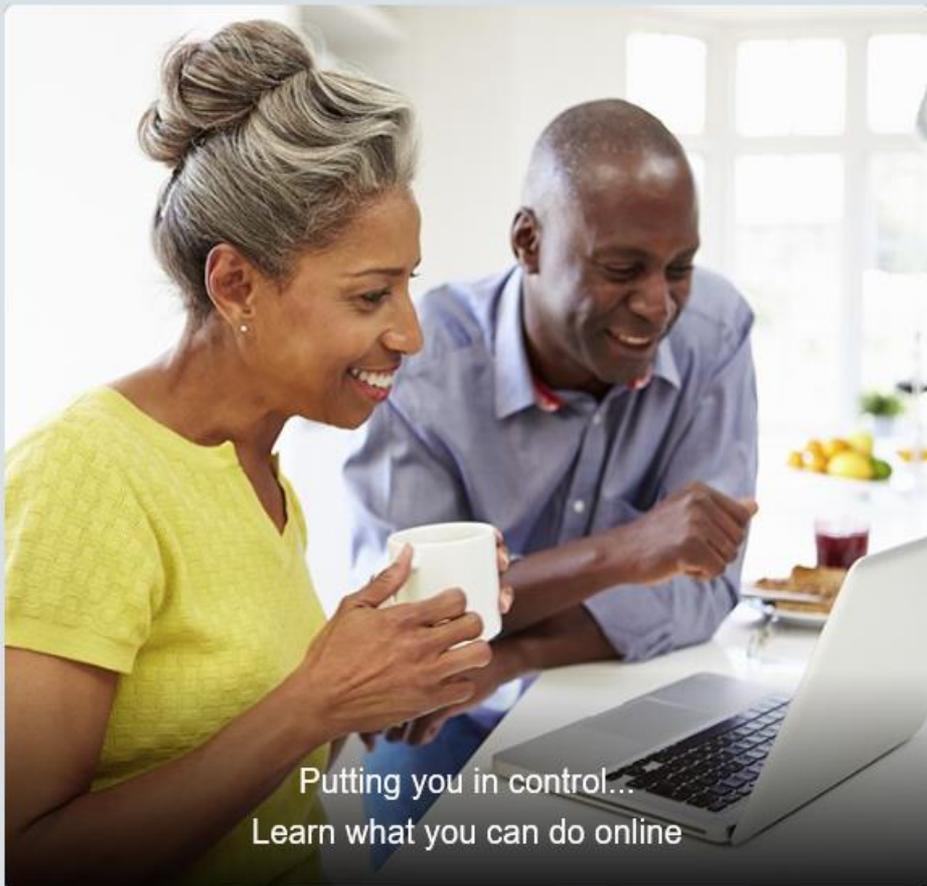


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File Online – Click on Disability



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Learn about Disability Benefits

Social Security pays disability benefits to people who can't work because they have a medical condition that's expected to last at least one year or result in death. Find out if you qualify and how Social Security can help you.

[USE OUR DISABILITY PLANNER](#)

Already Receiving Benefits

If you receive Social Security disability benefits, you can get information and services for managing your benefits online.

[MANAGE YOUR BENEFITS](#)

Publications

- [Disability Benefits](#) 
- [Nutrition Assistance Programs](#) 
- [Other Disability Publications](#)

Related Information

- [Career Support for People With Disabilities](#)
- [The Faces and Facts of Disability](#)
- [Benefits for People with Disabilities](#)
- [Information for Representatives](#)
- [Helping Someone Apply Online](#)
- [What You Need to Know About The Online Disability Application](#)
- [Adults Disabled Before Age 22](#)
- [Social Security Disability Claims Process](#)

If you prefer to complete your application in a language other than English, the online application will give you the option to schedule an appointment to apply for benefits in your preferred language. The online application is currently only available in English.

[Apply for Disability](#)

[Return to a Saved Application](#)

[Check Application or Appeal Status](#)

Who can apply for adult disability benefits online?

You can use the online application to apply for disability benefits if you:



Social Security

The Official Website of the U.S. Social Security Administration

Apply for Benefits

Who Is Completing This Application?

Tell us information about the person completing this application:

- I am applying for myself.
- I am helping someone who is not with me, and therefore cannot sign the application at this time.

Do you have a *my* Social Security account?

- Yes
- No

Next

Previous

Select the second option if applying for someone else.



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The Official Website of the U.S. Social Security Administration

Apply for Benefits

i You have successfully created or signed into your *my* Social Security account.

We will associate your account with your application for benefits. You will be required to use your *my* Social Security credentials anytime you return to your application for benefits.

Information About Applicant

Your Name:

Please provide the name as it appears on the most recent Social Security card.

<input type="text" value="John"/>	<input type="text" value="Q"/>	<input type="text" value="Public"/>	<input type="text" value="--"/>
First	Middle	Last	Suffix

Social Security Number (SSN):

*** - ** -3405

Date of Birth:

February 1, 1953

Gender:

Male Female





We have suspended electronic access to your personal information.

We tried to match the information you provided with our records, but were unable to do so. You may try to access the electronic information again after 24 hours. Please verify your personal information again before trying to use this online service.

This suspension will not affect any Social Security benefits you receive. For further assistance, please [contact us](#).

Exit



[Privacy and Security](#)

[OMB No. 0960-0789](#)

[Privacy Policy](#)

[Privacy Act Statement](#)

[Accessibility Help](#)





Social Security

The Official Website of the U.S. Social Security Administration

Apply for Benefits

 You did not create or sign into your *my* Social Security account.

Please provide the information below so we can determine if you may continue with the application.

Information About Applicant

Your Name:

Please provide the name as it appears on the most recent Social Security card.

<input type="text" value="John"/>	<input type="text" value="Q"/>	<input type="text" value="Public"/>	<input type="text" value="--"/>
First	Middle	Last	Suffix

Social Security Number (SSN):

***-**-0219

Date of Birth:

<input type="text" value="July"/>	<input type="text" value="15"/>	<input type="text" value="1955"/>
Month	Day	Year

Gender:

Male Female

Are you blind or do you have low vision even with glasses or contacts?



Apply for Benefits

- 1 Provide Background Information
- 2 Provide Disability Information
- 3 Sign Medical Release
- 4 Confirmation

- Identification
- Medical**
- Work/Education
- Remarks
- Review

You must print this page or write down the re-entry number.

Re-entry Number: **75571446**

If something causes you to exit or you choose to save and return at a later time, you must use this number to continue your saved application process.

If you lose this number, you can recover it by signing into your *my Social Security* account, or registering for a *my Social Security* account. Without your re-entry number you will need to start a new application. Social Security Employees will never ask for your re-entry number, or will have access to it. This is to protect your privacy.

[Print this page](#)

In this section...

[Contact Information](#)

Re-entry Number

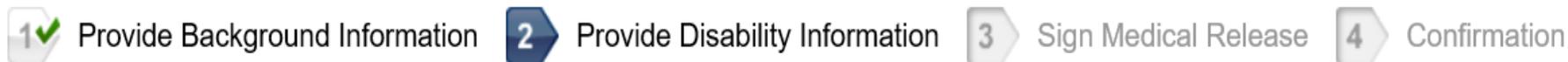
Next

[Previous](#)

[Save & Exit](#)



Apply for Benefits



Identification

Medical

Work/Education

Remarks

Review

Doctors and Other Healthcare Professionals for Tony Tiger

If you do not have any **doctors/healthcare professionals** to enter, click the **Next** button.

- If you were an inpatient or outpatient at a hospital or clinic, do not list staff doctors. We will ask about them later.
- Include only the people who have treated you for the conditions related to your disability.
- Give each person's first and last name if possible.

Status	Doctor/Healthcare Professional	City	Phone	Actions
--------	--------------------------------	------	-------	---------

No Doctors/Healthcare Professionals have been added.

Add

In this section...

- [Conditions](#)
- [Other Contact](#)
- Doctors**
- [Hospitals](#)
- [Tests](#)
- [Medicines](#)
- [Other Medical Records](#)

Next

Previous

Save & Exit



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- Identification
- General
- Other Benefits
- Remarks
- Review & Sign

Supplemental Security Income (SSI) for John Public

The SSI program pays benefits to people age 65 and older or blind or disabled adults under 65 who have limited income and resources. [More Info](#)

Does John Public intend to apply for Supplemental Security Income?

Yes No

Answer YES to SSI Question – unless you are sure you won't qualify.

Previous Application for Medicare, Social Security Benefits, or Supplemental Security Income (SSI) for John Public

Has John Public previously applied for Medicare, Social Security, or Supplemental Security Income (SSI) benefits?

Yes No

- Next
- Previous
- Save & Exit



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3rd Party Assistance with Applications

- Adults have to sign their own applications and medical authorizations (unless there is guardianship).
- The online application is signed electronically – if you do a 3rd party application online, then we mail the claimant a paper application to sign.
- An “x” can be a signature with witnesses.
- SSA must have consent forms to release info, found at www.ssa.gov/forms:
 - SSA-3288 Consent for Release of Information
 - SSA-1696 Appointment of Representative
- Let SSA know if legal guardianship is obtained.



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Secured Email Partners with Social Security

- **Consider becoming a secured email partner in our Social Security system.**
- **This allows you to safely send PII to any Social Security email address without any additional encryption process.**
- **If you are interested, please have an IT specialist from your organization reach out to your local Social Security PAS with:**
 - **Online domains you want secured (e.g., ssa.gov)**
 - **IT contact for making configuration changes to mail relays.**



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The Disability Determination



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Disability Determination Process

- **Claims for Ohio sent to Opportunities for Ohioans with Disabilities – Division of Disability Determination in Columbus**
- **Most cases decided within 120 of initial contact with Social Security**
- **We will send any evidence provided by claimant with the electronic file to Columbus....but no documents are necessary to make a claim!!**



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Ohio DDD Gathers Evidence and Makes Determination

- **DDD evaluates disabilities using “Impairment Listings” aka “Blue Book” - www.ssa.gov/disability/professionals/bluebook. Ex-Autism Spectrum listing 12.10 (adult)**
- **Compassionate Allowances – normally are immediate allowances. Ex – cancers, www.ssa.gov/compassionateallowances**



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Ohio DDD Evaluation

Examiner in Columbus will review:

- Recent physical and mental exams
- Any available test results
- Descriptions of functional limitations due to symptoms
- Previous work information.

No evidence needed to start the process, but lack of records may lead to consultative exam (CE).



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After the Disability Decision: Appeals and Payments



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Requesting an Appeal for a Denied Claim

- Apply online to www.ssa.gov/disability/appeal. You will need the denial letter date to complete the online appeal.
- Must file appeal within 65 days of notice. We can find “good cause” to re-open late appeals, such as hospitalization.
- Our system will guide which appeal level you are at:
 - Reconsideration
 - Hearing
 - Appeals Council Review
 - US District Court.
- Contact us by phone if unable to do online appeal.



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If Claim is Allowed

- **SSA award notice will be sent via mail**
- **Information will be in the notice regarding follow up actions**
- ***my*SocialSecurity will show award/denial dates and give status – but actual disability notices are mailed and are not available yet online.**



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Local Offices Determine if a Payee is Needed

- For initial claims and age 18 SSI medical reviews: 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. *Phone contact during pandemic.*



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Claim Approved: SSI

- **Income and resources must be verified (plus spouse or parent income if applicable).**
- **Automatically leads to full Medicaid through JFS.**
- **Living Arrangements verified**
 - **Where is the claimant living each month?**
 - **Is claimant paying rent or contributing towards household expenses? How much?**



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SSI Living Arrangements

Additional questions may be asked:

- **Does the adult pay a set amount of rent or pay a “share” of household expenses? A “share” is equal division of household and food costs b/n people living in the home.**
- **Is the rent amount of a reasonable, current value?**
- **Is the adult in a “separate household”?**

Max. amount SSI = aprox \$522/month if you are in a “subsidized living situation”.

- **Can be re-determined if a person contributes towards household expenses.**
- **Contact SSA at any point to update info.**



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SSI Re-Determination – Normally Every 6-12 Months

- **Local SSA specialist will contact claimant or payee to review income, resources and living arrangements.**
- **SSI recipients must report changes such as marriage, move, income immediately to SSA.**
- **If married, spousal (includes step-parents) income and resources may change or eliminate SSI amount. For SSI, marriage can be a non-ceremonial “holding out” relationship.**



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SSDI Approved

- Amount is based on work before disability onset.
- Dependent benefits will be paid, if applicable.
- Like retirement - no issues with other income, resources, living situations, etc. No redeterminations as with SSI.
- Minor child benefits convert to “Disabled Adult Child (or CDB) Benefits” on the parent’s record.
- Automatically leads to Medicare 24 months after benefits start.



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Can You Get Both SSDI and SSI?

- **In 2020, SSI supplements up to \$803 = \$783 SSI Amount Plus \$20 Disregard**
- **SSI pays on the 1st, SSDI will then pay on the 3rd of the month.**
- **Ex: Ryan gets \$600/month in SSDI. His SSI = \$203/month.**
- **For both SSI and SSDI: payments are sent to financial institutions or loaded to a Direct Express card.**
- **Children will have a Representative Payee receiving benefit on their behalf (as will adults with guardian and/or DD issues).**



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Continuing Medical Reviews = Both SSI and SSDI

- Regular medical reviews are conducted based on likelihood of impairment improving. Ex: possible improvement = 3 to 5 years
- Reviews currently are sent via snail mail, then completed with Ohio DDD
- All children getting SSI are medically reviewed at age 18. Work/fraud referrals can also trigger.



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