

The CORE Project

A Project of Washington PAVE

Topic: Keeping Records for Social Security

Choices Options Resources Education

Together, we are working to provide accurate and consistent information about adult services for people with disabilities, their families, and supporters.

CORE Project

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This bulletin is informational and not meant to be a substitute for legal advice. A Social Security representative or benefits planner can offer advice on your individual situation. If consulting an attorney, be sure the attorney you choose has expertise in disability law.

For more materials:
www.projectcore.org/materials.html

Keeping Records for Social Security

Supplemental Security Income (SSI) is one of the most important federal programs for people with disabilities. It can provide monthly payments to persons who have disabilities and limited income and resources. In addition, most people who receive SSI will also be eligible for health care coverage through Medicaid.

While receiving SSI, you or your representative payee will be responsible to provide information to the Social Security Administration (SSA) about your income and living circumstances. At different times you will be asked to provide information for continued eligibility, a work history for application for Social Security Disability Income (SSDI) and an annual protective payee report. Most people find it simpler to organize the needed information as it is gathered rather than re-collect it months or years later when requested by SSA. Keeping an SSI notebook provides one way to organize and file information that the SSA will need.

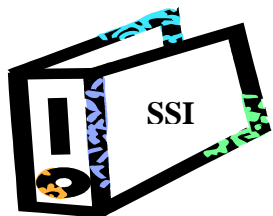
For information regarding Social Security Benefits: Social Security Hotline 1-800-772-1213

For information about Medicaid or Medicare Benefits: SHIBA Helpline 1-800-562-6900

For information about work incentives or employment supports: Call a Benefits Planner

Benefit Solutions: 206-322-8181 (King Co.) 360-405-0620 (Kitsap Co.)

Plan to Work: (Toll Free) 866-497-9443



Helpful Notebook Hints

- * Use a 3 – ring binder for each year
- * Add 12 dividers with a pocket for each of the 12 months
- * Include a sheet for Employment/Employer Information containing information about each job in that year
- * On each month’s pocket list the income (amount of wages, SSI check or any additional adjusted SSI checks).
- * **Save Everything** - You will receive letters and information from Social Security from several sources (local office & federal offices) Save it in the back of your binder
- * **Copy everything** – Before mailing wages, information, reports or applications through the mail make a copy and save it in the pocket of the month it was mailed
- * Store returned wage slips in the pocket for each month
- * Mail new wage statements in by the 10th of the following month
- * Learn how to estimate the SSI check. It helps in planning monthly expenses and preventing overpayments that may require repayment.

When I was able to organize a way to gather information needed by SSA, it seemed less like a huge puzzle that I couldn’t understand.

A Parent

Save Everything! – Copy Everything!



Calculating Your SSI :

For SSI a single recipient receiving SSI only

1. Gross wages paid in the month of _____	\$ _____
2. Subtract General Income Exclusion of (\$20.00)	- _____ 20.00
3. Equals	= _____
4. Subtract Earned Income Exclusion (\$65.00)	- _____ 65.00
5. Equals	= _____
6. Subtract Amount of Impairment Related Work Expenses (IRWE's) – if none enter 0	- _____
	= _____
7. Divide by 2 (this is the countable income)	$\frac{1}{2}$ = _____
8. 2006 Federal SSI Benefit Rate	\$603.00
9. Subtract Countable Income (# 7)	- _____
10. New SSI benefit for the month of _____ (Add 2 months to the month in # 1)	\$ _____

Information to Keep About Your Job and Employer

- Date job began/ended:
- Company name:
- Company address:
- Company phone number:
- Supervisor's Name:
- Starting pay per hour:
- Average number of hours per week:
- Job title:
- Job description:
- Describe any disability related job supports needed on job (such as job coach, reduced hours, etc):
- List dates and reasons for disability related medical leave of absences:



Additional Resources

- It Doesn't Take a Rocket Scientist http://ruralinstitute.umt.edu/training/publications/10th_edition_rocket.pdf
- Don't look for Logic: An Advocates Manual for Negotiating SSI and SSDI Programs
http://ruralinstitute.umt.edu/training/publications/logic/dont_look_for_logic.pdf
- Social Security Work Incentives Calculations <http://www.rcep7.org/%7Essawork/calculations/default.html>
- Social Security Forms including PASS Plan Form www.socialsecurity.gov/online/forms.html
- Benefit Eligibility Screening Tool (BEST): www.benefitscheckkup.org
- Benefits Planning Brief from NCWD/Youth (National Collaborative on Workforce and Disability)
http://www.ncwd-youth.info/assets/guides/quick_reference_guides/benefits_planning.pdf
- The Redbook, Work Incentives for People with Disabilities, SSA Pub. No 64-030, view or download online at:
<http://www.socialsecurity.gov/redbook/redbook.htm>
- Supplemental Security Income: A Bridge to Work - from NCSET (National Center on Secondary Education and Transition)
- Part 1: <http://www.ncset.org/publications/viewdesc.asp?id=937>
- Part 2: <http://www.ncset.org/publications/viewdesc.asp?id=938>
- Part 3: <http://www.ncset.org/publications/viewdesc.asp?id=1150>