

Training Dates/Locations

August 13, 2018 9:00am to 4:00pm	Disability Determinations Conference Room 7545 South Lindbergh Blvd, Suite 220 St. Louis, MO Free On-site Parking
August 14, 2018 9:00 a.m. to 4:00 p.m.	St. Louis Psychiatric Rehabilitation Center Dome Conference Center, First Floor 5400 Arsenal St. Louis, MO 63139 Free On-site Parking
August 15, 2018 9:00 a.m. to 4:00 p.m.	Governor's Office Building Room 450 (Ballroom) 200 Madison Street Jefferson City, MO 65101 Metered or Garage Parking
August 16, 2018 9:00 a.m. to 4:00 p.m.	The Whole Person Community Room 3710 Main Street Kansas City, MO 64111



Verifying, Reporting and Application of Information

Ashlea Lantz
ESFLMP Subject Matter Expert

MO EFSLMP BENEFITS PLANNING SERIES

AUGUST 6TH, 2018 1:30-2:30

Today's Objectives

- **Verifying benefits**
- **Reporting wages...the when, why and how**
- **Application...now what do I do with this information?**

Verifying Benefits

Benefits Planning Query (BPQY)

- The BPQY is a snapshot of the beneficiaries work history and benefits
- Includes the status of the beneficiary's Social Security administered disability cash benefits, Medicare, Medicaid (in some situations) scheduled medical reviews, representative payee, last work review date, and work history.

Requesting a BPQY

- A beneficiary may request his or her own BPQY directly at the local Social Security office or via the national toll free number at 1-800-772-1213 (TTY 1-800-325-0778).
- Another option is to have the WIPA project request a BPQY from Social Security by submitting proper authorization.
- Social Security and IRS rules require that you submit two SSA-3288 Release of Information forms when requesting a BPQY.
- With Consent - General explains why one form is needed to give consent to disclose Social Security information and records (non-tax return information) a second form is required by IRS regulations to authorize the disclosure of tax return information.

Benefits Planning Query (BPQY)

Confidential Social Security Data



NAME: EMILY CLAIMANT

SSN: 123-45-6789

RECORD	Social Security Disability Insurance (SSDI)	Supplemental Security Income (SSI)
	See Below	See Below
<u>CASH</u>		
Type of Benefit	Disabled Worker	Disabled Individual
Current Status	Current Pay	Current Pay
Statutory Blindness	No	No
Date of Disability Onset	07/02	05/99
Date of Entitlement	12/02	05/99
Full Amount	\$292.70	\$331.00
Net Amount	\$292.70	\$331.00
Others Paid on this Record	No	No
Total Family Cash Benefit	\$292.70	Not Applicable
Overpayment Balance	\$0.00	\$0.00
540 x 592 Amount Withheld	\$0.00	\$0.00

Reporting Earnings

Reporting Earnings

- You cannot assume people know how/when/why to report!

Why Report?

- Beneficiaries are often unsure of what should be reported and when
- Failure to report will result in an overpayment for the beneficiary!

“Failure to report causes more benefit problems than any other single issue”

Retrieved from: VCU National Training Center, Wage Reporting for Beneficiaries of SSA Disability Programs, Sept. 2012

Title II Reporting

Title II: When to Report?

- **Obtaining a job! (when it starts, stops or wage increase)**
- **Completion of TWP**
- **SGA level work**
- **The need to suspend/reinstate payments during EPE**

Reporting Earnings for SSDI

- Required to report new work activity to SSA
- Call 1-800-772-1213 and make a “work report”
- Go to local office and report work
- **ASK FOR A RECEIPT!**
- SSA will conduct Work Activity Review if TWP will be used or work activity expected to be over SGA

Reporting Earnings for SSDI

- If earning expected to cause use of TWP or SGA level
- SSA will send Work Activity Report (820/821) which asks for information about:
- Monthly Earnings, Employer (Name, Date of Hire, Wage, etc.), SGA Work Incentive Information (IRWE, Subsidy)
- SSA will send letter summarizing result of Work Activity Review (i.e. you used 9 TWP months and your EPE started X/XX/XX)

SSI Reporting

SSI Reporting

- Not just wages that have to be reported!
- ALL changes in income need to be reported – not just wages
- Any changes in wages – report!
- SSA often prefers monthly wage estimates
- Monthly wage reporting can cause confusion with constant readjustments

SSI Reporting

SSA evaluates eligibility and cash benefit amount each month

- **Must report earnings to SSA by the 10th of the following month**
- **Generally: Earnings in January (budget month) are used to determine SSI check in March (payment month)**
- **Critical to report to avoid overpayment**

Ways to report for SSI

Ways to report monthly earnings

- Take to local SSA office (by the 10th)
- Fax to local SSA office (by the 10th)
- Mail in each month (by the 10th)
- Telephone or Smart Phone app – only option if not using work incentives (by the 6th)

<https://www.ssa.gov/ssi/spotlights/spot-reporting-earnings.htm>

Questions?



Application

NOW WHAT?

How does this fit into your job?

1. Bring up the topic
2. Provide basic information
3. Provide referrals
4. Check-in

How does this fit into your job?

Basic Information and Referral

- Provide brief explanation of SSI and Title II Disability benefits and that work incentives exist
- Explain how to report earnings!
- Provide basic follow-up
- Understand that benefits education is part of the work equation
- Collect data – wages/hours worked (look for TWL, SGA)
- Never offer information unless you are certain it is accurate – when in doubt, refer!

Missouri Disability Benefits 101

Disability Benefits 101

working with a disability in Missouri



[Home](#)

Calculators

Disability Benefits 101: Working with a disability in Missouri

[Home](#) > [Calculators](#)

Calculators

Use DB101's online benefits planning Calculators to get ready for a change in your work or benefits, or to learn how benefits rules might apply to you.



Benefits and Work Calculator

What will happen to your income, benefits, and health coverage if you go to work? You can use the Benefits and Work Calculator to find out how a job may affect your total income and your health coverage.

[Go](#)

School and Work Calculator

Young people with disabilities can use the School and Work Calculator to find out how a job can affect their cash benefits and health coverage - and how staying in school can help.

[Go](#)

When to refer?

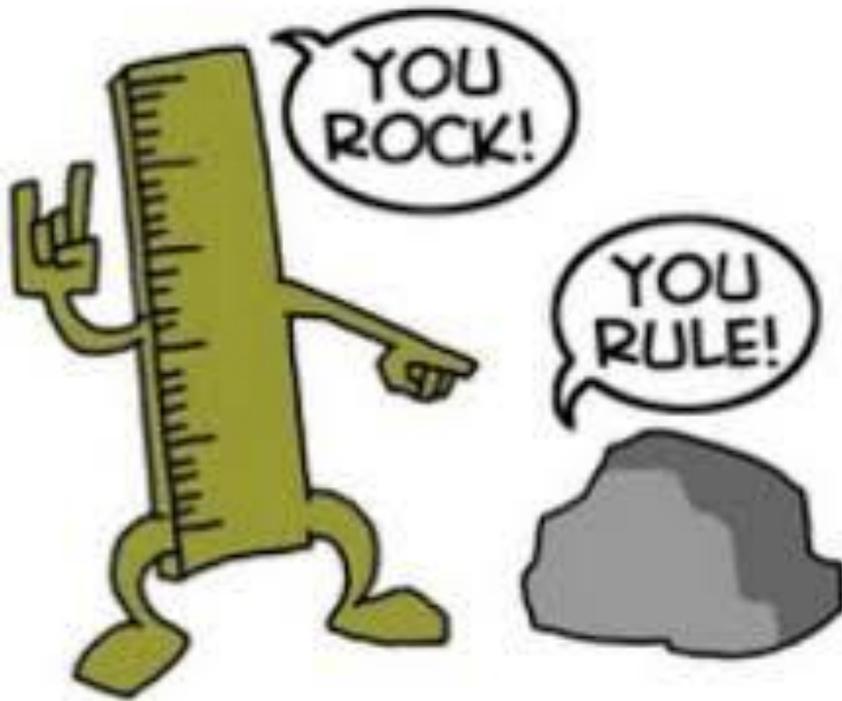
- Unable to identify benefit type
- Self Employment or not wage employment
- Has or needs specialized work incentives
- Has an overpayment
- Has questions about health care coverage or other benefits
- Married or under 18 and receiving SSI
- Not sure if TWP is used
- When in doubt...refer!

Where to refer: MO P&A (WIPA)

- **MO P&A: Serves specific counties in northern Missouri.**
- **If you have any questions about who provides WIPA services in your area, please contact the MO P&A Application Unit (800-392-8667)."**
- **Application Unit: 573-659-0678 / 800-392-8667 / Fax 573-659-0677**
- **MO Relay (TDD): 800-735-2966**

Where to refer: Paraquad (WIPA)

- **INFO AND REFERRAL:**
[HTTPS://WWW.PARAQUAD.ORG/PROGRAMS-AND-SERVICES/INDEPENDENT-LIVING-SERVICES/INFORMATION-AND-REFERRAL/](https://www.paraquad.org/programs-and-services/independent-living-services/information-and-referral/)
- **Paraquad's serves the city of St. Louis and the following Missouri counties: Audrain, Bollinger, Butler, Callaway, Cape Girardeau, Carter, Crawford, Dent, Dunklin, Franklin, Gasconade, Howell, Iron, Lincoln, Jefferson, Madison, Maries, Mississippi, Monroe, Montgomery, New Madrid, Oregon, Osage, Pemiscot, Perry, Phelps, Pike, Pulaski, Ralls, Ripley, St. Charles, St. Francois, St. Louis, Ste. Genevieve, Scott, Shannon, Stoddard, Texas, Warren, Washington and Wayne**



Next steps

BREATH...YOU GOT
THIS!!!

References

- Molly Sullivan, Griffin-Hammis Associates
- Beth Keeton, Griffin-Hammis Associates
- VCU WIPA National Training and Data Center
- SSA Red Book
- <https://www.ssa.gov/redbook/>
- SSA Program Operations Manual System
<https://secure.ssa.gov/apps10/>

Questions?



EFSLMP Community of Practice

If you are not a current subscriber to ODEP's EFSLMP mailing list, you can register [here](#).

Contact



ASHLEA LANTZ

EFSLMP SME

Ashlea.Lantz@griffinhammis.com

Cell: 319-361-0214