

The Social Security Program

SSI = Supplemental Security Income

- For aged (65 or older), blind, and disabled individuals
- Must be US Citizen. Some non-citizens may be eligible.
- The 2016 Federal Monthly Benefit Rate is \$733 for an individual, \$1,000 for a couple
- Benefit amount is affected by income or state supplements.
- Work history not required
- The resource limit is \$2,000 for an individual and \$3,000 for a couple. This DOES NOT include your primary residence or one vehicle.
- Medicaid entitlement is automatic, effective the same month as benefit payments.
- SSI limited to \$30 per month if living in hospital or skilled facility.
- Not eligible if living in correctional facility

SSDI = Social Security Disability Insurance Benefits

- Funded through payroll (FICA) taxes. Employment-based social insurance program
- To be fully insured, individuals must have worked 5 out of 10 years prior to the date of disability, earning 20 out of 40 quarters of coverage. Special rules apply for those under age 31 (usually 6 out of 13 quarters of earnings are required for eligibility).
- Timely filing of claims is important. You lose your insured status approximately 5 years after you stop working. An application can be filed after the date last insured (DLI), but the date of the disability must be established before the DLI for you to be eligible for benefits.
- A claimant may also be eligible for Widow's or Children's Disability Benefits (DWB or CDB) on a deceased spouse's or parent's wage record.
- Medicare entitlement is automatic after 24 months of payments.

What qualifies as a disability?

- Must have a physical or mental impairment(s)
- Must prevent them from working
- Must be expected to last at least 12 months
- (For children based on functional limitations not ability to work.)
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The Appeals Process

1. A request for Reconsideration = The first appeal asking for reconsideration of your case
2. Administrative Law Judge hearing = The second appeal A Request for Hearing
3. Review by the Appeals Council
4. Federal court review

Help Me Help You

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The four-step process includes:

- 1) Month 1/First visit, complete the initial paperwork (this includes ordering medical records and waiting on medical records)
- 2) Month 2/Second visit, review medical records, upon proof that there is a case, begin application process. Can start phone interviews one to two times per week... or more.
- 3) Month 3/Third visit, continue or complete paperwork, secure work records, or any other necessary items. Complete phone interviews.
- 4) Submit application once everything is complete.



Referral for Social Security Benefit Enrollment Assistance

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|---|--|
| SSI Requirements
• Age 65 or older
• Blind | • Medical Condition (mental or physical)
• Disabled & not working
• US Citizen/Perm Resident |
|---|--|

SECTION A:

Referring Party Name: _____	Agency: _____
Phone: _____	Fax: _____
Date: _____	

SECTION B: *These details must be provided in full*

Client's Full Name:			
SSN:	Date of Birth:	Language:	Client Number:
Phone Number:	Message Phone:	City and State of Birth:	
<input type="checkbox"/> Housed (Street Address):	<input type="checkbox"/> Homeless /Transitional /Shelter (Explain)	<input type="checkbox"/> US Citizen <input type="checkbox"/> Permanent Resident (Date of Residency):	

SECTION C: Reasons for referral & documentation support; in particular how disability affects the client's ability to work

SECTION D: Outcome to referral (To be completed by HMHY Staff)

Received Date:	Outcome: <input type="checkbox"/> Open <input type="checkbox"/> Closed <input type="checkbox"/> Client Ineligible
Staff Name:	Comments:

How We Help:

- HMHY provides assistance free of charge for homeless individuals
- HMHY may assist those who do not yet have representation of a pending claim for SSI/SSDI
- HMHY may assist individuals whose claims are not currently at Hearing (ALJ) level

Fax completed referral to (562) 570-8234