Supporting Beneficiaries to Manage their Work Incentives and Comply with SSA Requirements

As we continue to provide proactive follow-up services to beneficiaries, here are several ideas for ways in which we can support beneficiaries to manage their work incentives and comply with SSA requirements.

1. Set aside time to review WIPs developed with beneficiaries to ensure they are current and that the follow-up contact links them with the services and resources the beneficiaries need.
2. Check for status updates with beneficiaries in the next couple of months and continue to provide information they need.
3. Ensure that anticipated problems the beneficiary may encounter are addressed. Check with beneficiaries to ensure there are no problems encountered with benefits.
4. Carefully track critical transition points for each beneficiary. Ensure that the beneficiary and their employment support team have information or resources needed for those critical transition points (who to contact, what to do, when to anticipate changes).
5. Prepare the beneficiary for upcoming developments with their benefits, any next steps required or what to expect in the future. Lay the groundwork for what they will need to do at the critical touch-points. Plan ahead so you can inform the beneficiary to be aware of reporting information to SSA.

Critical Touch-Points for SSI Recipients:

- Start or end of employment
- Changes in earned or unearned income
- Reaching the Break-Even Point (BEP)
- Movement into 1619(b) status
- Identification and use of IRWE or BWE
- Changes in student status or attainment of age 22 for SEIE
- Approval of a PASS and subsequent review points
- Attainment of age 18
- Eligibility for Title II benefits (SSDI, CDB, DWB, Retirement Insurance Benefits [RIB])
- Changes in living arrangement, marital status, or resources

Critical Touch-Points for Title II Beneficiaries:

- Completion of the Trial Work Period

- Participation in and completion of the Extended Period of Eligibility
- Identification and use of IRWE, Subsidy, or Un-incurred Business Expenses and Unpaid Help (if self-employed)
- SGA determinations
- End of Extended Period of Medicare Coverage
- Attainment of dual entitlement (CDB becomes insured on own record)
- Transition to retirement benefits (early retirement or FRA)

Critical Touch-points that Impact both SSI Recipients and Title II Beneficiaries:

- Cessation of benefits due to medical improvement
- Expedited Reinstatement eligibility
- Overpayments/underpayments

Collaborate With Other Members of the Employment Support Team

Proactive follow-up also includes contact and collaboration with other members of the individual's employment support team. Regular communication should be taking place between all partners in the beneficiary's network. Collaborate with other stakeholders to identify what additional tasks need to be completed in order to continue to support the beneficiary to achieve his/her employment goal.

In addition, you may want to talk to members of the beneficiary's employment support team to take an active role in completing the action steps laid out in the WIP. Look at any available source of assistance including:

- Representative payees, family members, other caregivers
- VR counselors
- Disability Program Navigators from the local One-Stop Career Center
- Supported employment personnel
- Case Managers or Service Coordinators from either the MH or the MR/DD systems
- Residential services staff
- Advocates

Ensure beneficiaries, family members and disability services professionals understand what information needs to be reported to the various governmental agencies. Information needs to be provided to WIPA participants on knowing what to report and how the reporting process works for all benefits and supports the person accesses that are impacted by work. As part of this, beneficiaries need to be taught how to keep records and documentation – how to stay organized. They also need to understand how to communicate information to governmental agencies to make sure information provided is acted upon.

It is a good idea to teach them how to save paycheck stubs in a consistent manner, collect and keep receipts for any work-related expenses, and document any supports received on the job. Although these documents may not be needed immediately, it is essential for the individual to begin building good habits and recordkeeping.

Make sure that beneficiaries understand that they have not reported work at all unless they have provided proof, and have received a receipt. Also, teach beneficiaries to keep a good record of all contacts with the SSA. If the beneficiary reports the work monthly, have him or her keep all the receipts and pay stubs. Remind the beneficiary also to keep all of the IRWE receipts, letters regarding subsidy, or any other evidence that may help prove appropriate work incentives in the future. These should always be submitted at the same time work reports are made or repeated.

Assist beneficiaries and the support team in identifying appropriate work incentives that apply in their unique situation, and give them resources (fact sheets, SSA publications, or information from www.socialsecurity.gov/work) to utilize the recommended work incentives. Teach the beneficiary and support team how to move forward to utilize the identified work incentives. It is critical that CWICs realize in this stage you are acting as a guide to teach the beneficiary how to manage their own benefits in the future. Benefits literacy is one of the keys to enhanced self-sufficiency.