

## Questions from Transition Booster Session: SSI/SSDI

1. Are you going to address the disabled child benefit under SSDI?  
Reference slides 19-21. Children may get benefits beyond age 18 or 19 if still in high school from a deceased, disabled or retired parent who is receiving a benefit from SSA if they are found to be disabled before the age of 22. <https://www.ssa.gov/benefits/disability/qualify.html#anchor7>
2. Do you have to request for Both SSDI and SSI to be considered (ex: box to check on app, ect)?  
Reference: slides 15 and 35. While Social Security will screen all adults age 18+ for SSDI, you still need to say “YES” online to the question “Do you intend to file for SSI”. Or make a phone appointment if you don’t want to do the online application. While all adults age 18+ can apply online for the SSDI benefit, the SSI portion of the claim usually requires an interview by a Social Security claims technician. File online at [www.ssa.gov/disabilityonline](http://www.ssa.gov/disabilityonline), and schedule the SSI portion of the application by calling 800-772-1213 8am to 7pm weekdays. Even if you don’t make an appointment for the SSI portion, the local office will contact you for more SSI info based on the SSDI “Intent to File SSI” question.
3. If your dependent child that has a disability draws on your record when you retire, can they get their OWN benefit and still tag onto your benefit? Reference: see question 1 above for information on DAC (Disabled Adult Child) benefits. If a DAC also qualifies for SSDI on their own record – either before drawing on a parent record, or after drawing on a parent record – then they would have “Dual Entitlement”, meaning a possible benefit from both records. However, similar to how a spouse retirement benefit works with Social Security, the benefit AMOUNT is whichever record provides a HIGHER amount, on the parent record or on the individual’s SSDI record. <https://www.ssa.gov/benefits/disability/qualify.html#anchor7>
4. If a child has a trust , would that effect the disabled child’s SSI? Reference: SSI Resource slide 25. Trusts and Special Needs Trusts may be resources for SSI eligibility. We will ask about any type of trust resource, including special need or pulled Medicaid trusts, during the SSI application interview. A copy of the trust may be requested so that it can be reviewed to determine whether it is a countable or excludable resources. The Understanding SSI Guide at <https://www.ssa.gov/ssi/text-resources-ussi.htm> has a link in the resource section to our “Trusts” spotlight, <https://www.ssa.gov/ssi/spotlights/spot-trusts.htm>. Note: STABLE accounts are excluded as a resource for SSI, up to \$100K. Please see [www.stableaccount.com](http://www.stableaccount.com) for more info.
5. Can you provide medical doc upfront? No medical evidence is needed to apply, Social Security will contact any sources, reference slide 43. However, you can provide medical information with your application by faxing evidence to your local office – the local office address will be on the application receipt if you file online, or you can find fax #s at [www.ssa.gov/locator](http://www.ssa.gov/locator). You can also mail records to local offices, or fax those records directly to the Columbus Disability Examiner once the case is assigned in Columbus.
6. If I am helping a person get set up online and they have developmental/intellectual disability and no guardian. Is it best that we have a phone appointment? Reference slides 31-37. This is an individual situation – we discussed this some when talking about the [mySocialSecurity](#)

account at the start of the session as well. You can assist someone in applying for an account and/or benefits online if that person understands the idea of what is happening and what you are assisting them with. Unless there is a legal guardian in place, each individual will have to sign their own application one way or another, either online or we will send a paper application which that individual must sign and mail back to us. If the person cannot sign, we can accept an X as a signature with witnesses (no notary is required!). For SSI, they will need a telephone interview in most cases and will have to give some verbal consent if possible for you to do the interview for them. If you are their legal guardian appointed by the courts, you can complete the application for them. Reminder – you do NOT need to have any guardianship to move forward in helping your child file for benefits at age 18!

7. Can a disabled adult child NEED to draw on his/her retired parent's record AND/OR may they draw benefits on their own right? See answers to questions 1 and 3.
8. You mentioned that for adult children to apply for SSDI and also check the box to be considered for SSI and to immediately call our local office.....but is it better to call right away or have them apply online for SSI? Please refer to question 2 on applying for SSDI and SSI. Note: the same medical decision for the SSDI benefit is made for the SSI claim. You can call to schedule the SSI interview, but we recommend you file online to apply for the SSDI benefits if possible. It can take several weeks to schedule an SSI interview, and filing the online SSDI claim may speed up that process.
9. Does it make any difference if your child is already working with OOD since they make the The Opportunities for Ohioans with Disabilities is the parent agency of the Ohio Disability Determination Division, aka the Ohio Disability Determination Service (DDS), slide 43. While there may be some shared OOD records which are easier to obtain for medical information, there is no difference in the application process. However, with that said, it may make a difference in how we are looking a "Substantial Gainful Activity" aka SGA/work if someone has special work provisions and conditions through OOD placement. Thus we will ask if there are special work conditions and/or supports if there is any work being done or that has already happened as part of the application. See form SSA-821 <https://www.ssa.gov/forms/ssa-821.html> for an idea of what work information we may ask for with an application.
10. How would an adult child who initially had their mother as a payee change it to no longer having mom as payee? Slide 49 reference payees. An individual can apply to be their own payee at any time. We will ask the individual's doctor or another health care professional for an opinion on the individual's capability to handle direct benefit payment, but the local Social Security office will make the final payee or direct payment determination – which can be appealed. [www.ssa.gov/payee](http://www.ssa.gov/payee).
11. If there is an individual under the custody of Children's Services, and no parental contact (but they are alive). Can they go ahead and apply for SSI/SSDI during the month that they turn 18 years old or are the parental income questions still asked? Do you still recommend that they do not apply until the month after their 18th birthday to afford parental income information questions? Is there any loophole for transition age individuals to be able to apply prior to their

birthday month for Children's Services individuals? Could those individuals under Children's Services custody possibly be eligible for SSDI if they do not have access to parent information? Reference slide 26 – parental income does NOT count if the child doesn't live with the parent/s. So if a child UNDER 18 has a disabling condition, we would want an application to be filed NOW if excess parental income/resource issues are not in the mix. Go to [www.ssa.gov/childdisabilityreport](http://www.ssa.gov/childdisabilityreport) to get the SSI ball rolling for someone under age 18.

But for some children in Foster Care, federal/local care payments may make the child SSI ineligible until the child becomes an adult and foster care ceases. There are some special provisions which allow for Social Security to process an SSI application up to 180 days before Foster Care benefits end – or are expected to end. Remember that the applicant must have a disabling condition and appears likely to meet all of the non-medical SSI requirements once the foster care payments terminate. See <https://www.ssa.gov/ssi/spotlights/spot-disabled-youth.htm> for more info.

12. How do you find out what are approved IRWE's? Reference slide 62 for a list of some examples and also see slide 56 for link to the Red Book which is the Guide to Work Incentives. [www.ssa.gov/redbook](http://www.ssa.gov/redbook).
13. If you are a rep payee for your young adult, can your young adult beneficiary also set up his own my Social Security acct? Reference question 5 above. Again, if the young adult is 18, has a Social Security number, an email address and a US mailing address, they can create their own **mySocialSecurity** account if they understand the process and online account creation. However, you are not able to setup an account for another person as a 3<sup>rd</sup> party, even if you are a legal guardian or POA.  
  
If you are a Representative Payee, you can access the beneficiary's information on your OWN **mySocialSecurity** account. Note: without a credit history, some young people have difficulty with the identify verification process creating an online account and may not be able to complete an online account at this time – if that person is applying for benefits, remember to stay in the application path, click whatever button is next and you will get to the application, even if you flunk creating the online account!! [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount).
14. Can SSI pay for gas money for rep payee taking beneficiary to places he needs to go? SSI benefits are to be used to meet the needs of the disabled individual who receives it. This may include food, shelter, clothing, transportation and other personal needs. There is good info in the "Guide for Payees" at <https://www.ssa.gov/payee/>.
15. Regarding IRWE is there a maximum amount you can deduct? Is there a list of what are considered IRWEs? Do we have to turn in receipts for IRWEs? See question 12.
16. Does a rep payee need to fax first job information to local SSA office? I was told I needed to send employer letter stating job info & pay to local office. Refer to work slides 55-63. Yes, you must call and report any work to the local SSA office. We will need the employers name and EIN, along with information about pay rate/hours for the beneficiary. After we intake this

information, we may send the beneficiary a form SSA-821 (see question 8 above) to get more information on the job/s. After this initial report, work can be reported online with the *mySocialSecurity* account, fax, or even phone app for SSI. For more info, see <https://www.ssa.gov/ssi/spotlights/spot-reporting-earnings.htm>.