

Updates from Social Security

October 2024



NC COALITION to
HOMELESSNESS end

Context

Since Martin O'Malley became Commissioner of the Social Security Administration (SSA) in December 2023, several significant changes have been implemented.

This is a broader push by the SSA to reduce barriers to accessing benefits and to make the system fairer and more responsive to the needs of vulnerable populations.

Appointed Representative Services Enhancements

Policy Change

- Appointed representatives can now go online to get the status of disability cases pending at DDS (initial and recon claims) or closed within the last 65 days.

**Representatives with cases pending at the hearings or appeals levels are eligible to enroll in ARS*

What this means for Providers

- Expanded access to the electronic folder for clients – initially could only get status reports for appeals at the hearings level and the Appeals Council.
- Able to see information for each case, including case level, receipt date, date assigned, claim type, and status.

SSA-1699: Representative Registration Form

Policy Change

- As of September 30, 2024, all Appointed Representatives assisting SSI/SSDI claimants using the SSA-1696 must now register as a Representative using the new SSA-1699: Representative Registration form.
- Still need to submit a new SSA-1696 with every new claimant
- Only need to register once using the SSA-1699 unless your information changes.

What this means for Providers

- All representatives will have an Appointed Representative ID number. When you include your Representative ID on the SSA-1696, SSA will have a streamlined process to add you to the claim in their electronic system.
- This will help ensure you get copies of communications sent to the applicant and that DDS can see that you are the appointed representative on the claim.

Overpayment Withholding Rate

Policy Change

- SSA has decreased Social Security beneficiaries' default overpayment withholding rate effective March 25, 2024
- The default overpayment withholding rate for beneficiaries will be decreased to ten percent (or \$10, whichever is greater) as opposed to 100 percent

What this means for Applicants

- Significantly decreases financial hardships for people with overpayments
- The change applies to new overpayments.

Past Relevant Work Changes (PRW)

Policy Change

- Effective June 22, 2024
- The relevant work period has been reduced from 15 to 5 years.
Additionally, SSA will not consider past work that started and stopped in fewer than 30 calendar days to be PRW.

What this means for Applicants

- The changes will better reflect the current evidence about worker skill decay and job responsibilities, and reduce processing times
- Less work history to have to collect/recall!

Dictionary of Occupational Titles Update

Policy Change

- Effective June 22, 2024
- SSA has published new public guidance and instructions about how they use Dictionary of Occupational Titles evidence in the disability evaluation process.
- There are 114 DOT occupations that will no longer be used to support a “not disabled” finding at the last step in the evaluation process for disability determinations.

What this means for Applicants

- DOT last updated in 1991
- Potential for increased access to disability benefits since only the most relevant occupations will be considered when determining if an applicant could perform other types of work

SSI Rental Subsidy Policy

Policy Change

- Effective September 30, 2024
- This final rule provides that a “business arrangement” exists, such that the SSI applicant or recipient is not considered to be receiving ISM in the form of room or rent, when the amount of monthly required rent for the property equals or exceeds the presumed maximum value (PMV).

What this means for Applicants

- This policy will apply nationally, making it less likely that renting at a discounted rate or other rental assistance will affect a beneficiary's SSI eligibility or monthly payment amount
- For example, previously if someone was assisting to pay someone’s rent, SSA would reduce their monthly payment amount

In Kind Support & Maintenance (ISM): Omitting Food from Calculations

Policy Change

- Effective September 30, 2024
- SSA is updating SSI regulations to remove food from the calculations of In-Kind Support and Maintenance (ISM)
- Previously, food from non-excluded sources (such as from family and friends) counted as in-kind income and reduced an SSI recipient's benefits.

What this means for Applicants

- The SSA will no longer count food from non-excluded sources, such as family and friends, as in-kind income.
- Benefit of more people being able to qualify for SSI and keep their full benefit and reduce reporting burdens.

SSI iClaim Expansion

Policy Change

- SSA announced plans for a multi-year effort to simplify the application process for Supplemental Security Income (SSI) by starting to offer an online, streamlined application for **some** applicants starting in December 2024

SSI iClaim Eligibility Restrictions

- Must be between 18-64
- Never married
- First time applying for benefit
- *Be mindful that these restrictions limit the access to the online application for many people

Launch of SecurityStat

- SecurityStat launched as a way to fast-track immediate customer service improvements
- A collaboration with Social Security experts and executives to identify SSA's most pressing problems.
- As a result, SSA is implementing changes to reduce disability processing times, National 800 Number wait times, and to resolve overpayment and underpayment injustices

Make sure you are staying up to date with SSA!

- The SSA provides updates via Dear Colleague letters:
<https://www.ssa.gov/news/advocates/#advocates2024>
- Subscribe here:
https://public.govdelivery.com/accounts/USSSA/subscriber/new?topic_id=USSSA_143
- [Downloadable SSA Action Plan 2024](#)



Join the SAMHSA SOAR email list to stay up to date on SOAR news and events!



<https://bit.ly/SOAReNews>

(Link is case sensitive)



NC SSA Update

A request from SSA

- To kick-off the new fiscal year, SSA is planning a training session for the SOAR Liaisons (likely mid-November)
- Training will focus on SOAR Liaisons' role and how they can assist SOAR providers when receiving communications regarding application and/or form issues
- Emily Brown (NC SSA AWIC) requested a few bullet points on what SOAR providers do on their end

Drafted bullet points

- **Application Preparation:** SOAR Caseworkers fax a completed SSA-3288 and additional information form to SSA SOAR Liaison to obtain background information within ***two to ten business days***.
- **Application Submission:**
 - SOAR Caseworker submits application to SSA office **via drop box, phone interview, or online application**
 - Records and forms submitted as electronic file to DDS
 - Case is flagged in the system as “Homeless”
 - SOAR Caseworker faxes to Angela Herron at DDS with the full name and full SSN of the applicant as soon as the application is submitted to SSA. DDS is now aware a SOAR case will be coming to them.
 - DDS Examiner must identify this case as SOAR case based on the 1696 and 3368 within ***5 days of receiving the case*** in order to assign it to ***a SOAR-designated examiner***.
 - Case cannot move without the **1696** attached

Drafted bullet points cont.

- **Gather and Submit Medical Evidence:** SOAR providers collect relevant medical records and submit them alongside the application to support disability claims. SOAR providers write a narrative to help the DDS examiner “see” the claimant.
- **Maintain & Facilitate Client Communication:** Providers work closely with clients to gather signatures, complete forms, and provide updates, helping to resolve any delays. Caseworkers act as the representative for the client and should always be the first point of contact.
- **Track Application Status:** SOAR providers follow up on pending applications with SSA offices and address any issues or missing documentation.
- **Resolve Application Issues:** Providers troubleshoot application or form discrepancies and work to address requests for additional information from SSA.
- **Support Collaboration:** SOAR providers act as a bridge between clients and SSA, facilitating smooth communication to ensure timely application processing. Again, it is crucial the SOAR provider be the first point of contact during application processing.