Title XVI Return-to-Work Checklist

Before you close a successful SSI case, use this checklist to explain key information to the client and give them the "Returning to Work When You Are Ready" handout.

Return-to-Work

- ☐ SSI recipients always have more money when they work because Social Security counts less than half of wages for people on SSI.
- ☐ SSI payments go down gradually as wages increase.
- ☐ SSI has special rules for students under age 22 and blind individuals:
  - The Student Earned Income Exclusion means most income does not count.
  - Blind Work Expenses let you deduct all costs associated with working.
- ☐ 1619(b) Medicaid protects you even if wages reduce your SSI payment to $0:
  - You must earn less than a state threshold amount unless you have higher than average Medicaid expenses.
  - Your resources must stay under the SSI resource limit.
- ☐ 1619(b) also keeps you connected to SSI to restart payments if your wages drop: Simply report the drop in income to start getting SSI payments again.
- ☐ Talk with a benefits planner for details: To find free help from a benefits planner, use the "Returning to Work When You Are Ready" handout. The planner can give you a customized analysis of how work will impact every public benefit you receive.

Reporting Requirements

- ☐ Report any address change and any change in living arrangements.
- ☐ Report wages and self-employment income every month.
- ☐ Report if you get married or separated.
- ☐ Report any unearned income (gifts, settlement payments, inheritances, etc.).
- ☐ Report any major changes in your resources (things that you own).

Overpayments

- ☐ If Social Security is wrong about the overpayment, you can appeal: ssa.gov/forms/ssa-561.pdf
- ☐ If the overpayment was not your fault, you can request a waiver: ssa.gov/forms/ssa-632-bk.pdf
- ☐ You can request a reasonable repayment agreement: ssa.gov/forms/ssa-634.pdf

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