



# Social Security Benefits and Representative Payeeship

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**Lake County Board of Developmental Disabilities/Deepwood**

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## SSI vs SSDI

- There are two different types of programs through Social Security
  - Each program has their own set of guidelines

### Type 1

SSI- Supplemental Security Income for the Aged, Blind, and Disabled

### Type 2

SSDI- Social Security Disability Insurance  
RSDI- Retirement, Survivors, and Disability Insurance  
CDB- Childhood Disability Benefit  
DWB- Disabled, Widower Benefit



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# SSI

- Purpose: Food and Shelter
- Eligibility
  - Must have limited income
  - Resources less than \$2,000 (\$3,000 for a couple)
  - Must have a severe medical or mental health condition
  - Must be a U.S. Citizen
  - Must file for any other benefits that they may be eligible for (Must file for SSDI prior to filing for SSI)
  - Is not working OR is working, but not performing Substantial Gainful Activity (2022 is defined as \$1,350/ month)



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## SSI

- 2022 Maximum Benefit Amount \$841 for an individual
- To remain eligible/ redeterminations
  - Resources must remain under \$2,000 (\$3,000 for a couple)
  - Medical improvement does not occur
  - Unearned income does not exceed \$841/ month
  - Gross earned income does not exceed the state Medicaid threshold amount, or individual threshold amount
  - Remain a resident of the U.S.



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## SSDI

- Same eligibility requirements as SSI
- Amount paid out is based off of work history of the individual, spouse, and/ or parents
- Amount received can vary and there is no cap
- Working while on SSDI; process is much different






## RSDI, CDB, DWB

- These programs are not available to everyone; only specified groups
- When applying for SSDI social security *should* automatically put the person into the correct category to receive the benefits they are entitled to
- It is important for individuals, guardians, and advocates to be aware of what benefits they may be eligible for



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# How to find out what you are receiving and what you may be eligible for

- Go to or call your local Social Security Administration office
- Painesville SSA #1-877-692-3143
- Request a Benefits Planning Query (BPQY)



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# What does it mean to be a Representative Payee?

- A Representative Payee is a person or organization who has been appointed by the Social Security Office to receive Social Security or SSI benefits on behalf of anyone who cannot manage or direct the management of his or her benefits
- The main duties are to use the benefits to pay for the current and future needs of the beneficiary, properly save any benefits not needed to meet current needs, and complete all reporting requirements as mandated by Social Security Administration
- A Representative Payee must also keep records of expenses
- When Social Security Administration requests a report, the Representative Payee must provide an accounting to them of how he or she used or saved all benefits







# How to apply to be a Representative Payee/ Changing Representative Payees

- Contact the Social Security Administration office nearest you to apply to be a Representative Payee
- You must complete form SSA-11 (Request to be selected as Representative Payee)
- You will need to provide:
  - U.S. documents to prove your identity
  - Your social security number, or if you represent an organization, the organization's employer identification number
- The individual or guardian will typically need to give either written or verbal permission of any new or changing Representative Payee application



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# Reporting responsibilities

- You must report the following events as soon as possible either over the phone, or drop off a written notice with the information to the local office:
  - The beneficiary passes away, moves, or marries
  - The beneficiary starts or stops working; even if the earnings are small
  - The disabled beneficiary's condition improves
  - The beneficiary start receiving another government benefit, or the benefit amount changes
  - The beneficiary plans to leave the U.S. for 30 days or more
  - The beneficiary is imprisoned for a crime that carries a sentence of over one month
  - The beneficiary is committed to an institution by court order for a crime committed because of mental impairment
  - Custody of a child beneficiary changes or a child is adopted
  - The beneficiary is a child (including a stepchild), and the parents divorce
  - You can no longer be payee
  - The beneficiary no longer needs a Representative Payee



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# Additional Resources

- Robyn Jenkins
  - (440) 350-5065 / [Robyn.Jenkins@lakebdd.org](mailto:Robyn.Jenkins@lakebdd.org)
- <https://www.ssa.gov>
- [www.oh.db101.org](http://www.oh.db101.org)
- [www.insurance.ohio.gov](http://www.insurance.ohio.gov)
- Painesville Social Security Administration Field Office
  - 1-877-692-3143
  - 55 West Jackson St. Painesville, OH 44077
  - Hours: Monday 9AM-4PM, Tuesday 9AM-4PM, Wednesday 9AM-12PM, Thursday 9AM-4PM, Friday 9AM-4PM



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