THURSTON - MASON COUNTY DEVELOPMENTAL DISABILITIES GUIDELINE:
Social Security Benefit Review

Supported employment providers in Thurston and Mason Counties shall support clients and their advocates (family member, payee or guardian if applicable) in obtaining information regarding earned wages and the impacts of Social Security benefits. This information will be provided as part of an intake process, annually and as needed when earnings change. Referral and/or assistance from a benefits specialist and/or a Social Security Administration Representative are also available if needed. Contact Kim Jensen at jensenk@co.thurston.wa.us to request additional Social Security assistance for a client.

At Intake:
- Provide an overview of Social Security work incentives and how benefits may or may not be affected by earned income.
- Determine if benefit planning was completed by DVR or other entity.
- Discuss Social Security wage reporting and determine who will assist the client if needed. Document who has agreed to do this on the Individual Work Plan in the Social Security box.
- Complete the SSI Calculation Worksheet if applicable.
- Discuss how earned wages impact SSDI / SSDAC benefits. If the individual or family has questions or the individual does not know if they are in their Extended Period of Eligibility, refer to a benefits specialist.

At Job Offer/Consideration and Wage/Hour Increase:
- Complete the SSI Calculation Worksheet if applicable
- For SSI Recipients: If monthly wages will exceed the break-even point of $1,551/month (the 2015 limit) refer the client to a benefits specialist for further explanation and assistance understanding medical insurance impacts.
- For SSDI/SSDAC Recipients: If monthly wages meet or exceed the Substantial Gainful Activity (SGA) of $1,090/month (the 2015 limit) refer the client to a benefits specialist for further explanation and possible subsidy identification assistance. Be sure to look at longer months if the individual is paid hourly. Some months with 5 weeks may cause the individual to meet SGA for that month.
- Confirm that the person identified to report wages to Social Security is aware that they are supposed to do this and when it needs to be done. Document who has agreed to do this on the Individual Work Plan in the Social Security box.

At Job Stabilization:
Once stable, ask the individual and/or their advocates if they would like to submit a stabilization letter to the Social Security Administration. This letter outlines the supports needed to maintain stability on the job, lists current and future tasks, expected number of job coaching hours, level of support provided by the employer and co-workers (either hourly, or an estimated % of time), estimated work quantity compared to co-workers in similar positions, and any other information that may identify subsidy points in the job at a later date.
THURSTON - MASON COUNTY DEVELOPMENTAL DISABILITIES GUIDELINE:
Social Security Benefit Review

Annually:
- Review the SSI Calculation Worksheet if applicable.
- Confirm that the person identified to report wages to Social Security is aware that they are supposed to do this and when it needs to be done. Document who has agreed to do this on the Individual Work Plan in the Social Security box.
- For SSI Recipients: If monthly wages will exceed the break-even point of $1,551/month (the 2015 limit) refer the client to a benefits specialist for further explanation and assistance understanding medical insurance impacts.
- For SSDI/SSDAC Recipients: If monthly wages meet or exceed the Substantial Gainful Activity (SGA) of $1,090/month (the 2015 limit) refer the client to a benefits specialist for further explanation and possible subsidy identification assistance. **Be sure to look at longer months if the individual is paid hourly. Some months with 5 weeks may cause the individual to meet SGA for that month.**