

# Topics in SSI – Practical Tips on Recent SSI and Social Security Changes

Tracey Gronniger, Managing Director, Economic Security
Trinh Phan, Director, State Income Security
November 15, 2023



Justice in Aging is a national organization that uses the power of law to fight senior poverty by securing access to affordable health care, economic security, and the courts for older adults with limited resources.

Since 1972 we've focused our efforts primarily on fighting for people who have been marginalized and excluded from justice, such as women, people of color, LGBTQ individuals, and people with limited English proficiency.

# Justice in Aging's Commitment to Advancing Equity

#### To achieve Justice in Aging, we must:

- Advance equity for low-income older adults in economic security, health care, housing, and elder justice initiatives.
- Address the enduring harms and inequities caused by systemic racism and other forms of discrimination that uniquely impact low-income older adults in marginalized communities.
- Recruit, support, and retain a diverse staff and board, including race, ethnicity, gender, gender identity and presentation, sexual orientation, disability, age, and economic class.



#### Housekeeping

- All on mute. Use Questions function for substantive questions and for technical concerns.
- Problems with getting on to the webinar? Send an e-mail to <a href="mailto:trainings@justiceinaging.org">trainings@justiceinaging.org</a>.
- Find materials for this training and past trainings by searching the <u>Resource Library</u>, <u>justiceinaging.org/resource-library</u>. A recording will be posted to <u>Justice in Aging's Vimeo page</u> at the conclusion of the presentation, <u>vimeo.com/justiceinaging</u>.



## Key Takeaways

- A number of positive recent changes should make handling SSI and Social Security cases less burdensome.
- As changes occur, advocates should consider whether the changes protect the rights of clients and promote access to these critical benefits.





#### SSI appeal deadline

- Goldberg v. Kelly appeal period extended from 10 to 60 days.
- Goldberg v. Kelly allows individuals to continue receiving SSI benefits while their Reconsideration appeal is pending.
- Fact sheet on Amin v. Kijakazi



# Troubleshooting SSI appeal deadline

- If Reconsideration was filed timely but benefits do not continue:
  - Contact the manager of the local office and reference <u>EM-21064 REV</u> and the Amin settlement
  - Contact the <u>Regional Communications</u>
     Director
  - Contact the Amin plaintiffs' counsel



## SSI protective filing tool

- Online tool to get started on applying for SSI: <a href="https://www.ssa.gov/ssi/start.html">https://www.ssa.gov/ssi/start.html</a>
- After you complete the tool, a Social Security representative will schedule an appointment to help you apply for benefits.
- Request establishes a protective filing date, which will become the application date if you submit an SSI application within 60 days.
- EM 22015 REV



#### SSI exclusion of pandemicrelated financial assistance

- Reminder that pandemic-related financial assistance is excluded indefinitely from counting as a resource for SSI
- Includes the three federal stimulus payments issued in 2020 and 2021
- Use <u>EM 20014 REV 9</u> and <u>EM 21050 REV</u>
   <u>5</u> as guides
- <u>Fact sheet</u> on SSI exclusion





Social Security and SSI

#### Online services

- 3288 Consent for Release of Information
- iCDR Continuing Disability Review report: using your <u>mySocialSecurity</u> account
- SSI Protective Filing Tool
- Mobile Check-in Express: can scan a QR code at the local SSA office to check in and get your ticket number



#### ABLE Change in 2026

- ABLE age increase from 26 to 46
- ABLE allows people who became disabled before age 26 to open ABLE accounts and save money without affecting public benefits.
- Starting in 2026, people who were disabled before age 46 will be able to open ABLE accounts.
- **SSI**: ABLE account holders can save \$100,000 without affecting SSI eligibility.



#### Non-disability ALJ hearings

- Non-disability hearings (for example, overpayments) are now being assigned to the Special Review Cadre, rather than to the local hearing office.
- Specialized unit with specialized knowledge for this caseload
- EM 21000 SEN REV 4



#### Working with SSA

- Regional Communications Director: regional public affairs staff have an ombudsman-like role and can be particularly helpful where elevating the issue at the local office has been unsuccessful
- End of pandemic-era flexibilities



## Sign up with SSA for updates

The <u>Advocates</u> page on SSA's
 <u>Communications Corner</u> has copies of "Dear Colleague" letters, and a link to subscribe to page updates.



