

WHAT DO I NEED TO REPORT TO SOCIAL SECURITY AND WHEN?

What information should I report to SSA?

The answer depends on the type of benefits you receive. The SSI program involves a lot more reporting than the Social Security Title II disability programs like SSDI because the SSI program is means-tested. Below is a chart that indicates in general terms what beneficiaries need to tell SSA about. Keep in mind that for the SSI program, these reporting requirements apply not only to the SSI eligible individual, but also to the parents of children under 18 and to the spouse of an SSI eligible individual.

Supplemental Security Income (SSI)	Title II Disability Programs (SSDI, CDB, DWB)
<ol style="list-style-type: none">1. Unearned income including things like other SSA payments, child support payments, or any other cash received that is NOT wages.2. Any gross wages/earnings and net earnings from self-employment. This includes in-kind items received in lieu of wages (like room and board).3. In-kind support and maintenance received from others. This includes any assistance with food and shelter provided by another person.4. Change of address.5. Changes in living arrangements.6. Changes in marital status.7. Resources or assets received that cause total countable resources to be over the \$2,000 limit.8. Use of any specific work incentives.	<ol style="list-style-type: none">1. Any gross wages/earnings and net earnings from self-employment. This includes in-kind items received in lieu of wages (like room and board).2. Changes in marital status (generally only applies to Childhood Disability Beneficiaries and Disabled Widow Benefits).3. Change of address.4. Receipt of any public disability benefits such as Worker's Compensation.5. Use of any specific work incentives. <p>** Unearned income and resources are NOT considered by the Title II disability programs, thus are not required to be reported to SSA.</p>

How am I supposed to report this information to SSA?

Theoretically, there are many ways to report information to SSA, but some methods are more reliable than others. Ten tips for reporting relevant information include:

1. You may report in person or contact SSA by calling your local SSA telephone office number, or call toll free 1-800-772-1213 (wage reporting service by phone is available the first 6 days of the month). Tell them that you are on disability and are returning to work. You will get a receipt that you reported your work activity by phone. You will also get a work review form. **FILL THIS OUT AND RETURN IT TO SSA.**

The Work Incentives Network (WIN) helps people achieve their employment goals by supporting informed choices about employment and benefits. Additional information can be found at <http://www.oregon.gov/dhs/employment/VR/WIN/Pages/Index.aspx>.

The SSI program now has the SSI Mobile Wage Reporting (SSIMWR) application which allows you to report total gross monthly wages for the prior month using a mobile device.

You can download and install the free SSIMWR application on an Apple or Android mobile device. **SSA recommends calling from a quiet location because background noise may cause the report to fail.**

2. Keep a copy of all correspondence you send to or receive from SSA when you are attempting to report relevant information.
3. When reporting employment initially, or employment changes, always call SSA and describe the critical information SSA needs to know about your job. This includes:
 - Your name, address, phone number and SSN
 - Type of SSA benefits you are receiving
 - Name, address and phone number of employing company and direct supervisor
 - Date of hire/date of termination
 - Pay rate and average number of hours worked per week
 - Pay dates
 - Job title
4. After you initially report employment or an employment change, keep all of your pay stubs. Local SSA Field Offices vary in terms of how frequently they want you to mail in your pay stubs to verify your earnings. Check with your Claims Representative BEFORE you start mailing in pay stubs, so you know exactly who to send them to. Be sure to keep a copy of the pay stubs before you mail them in!
5. SSI recipients generally have to report earnings more frequently than Title II beneficiaries. Unless you are instructed otherwise by local Field Office staff, SSI recipients should mail in their pay stubs every quarter to minimize overpayments.
6. Do NOT assume that the check you receive from SSA is correct and has had wages accounted for. You need to know what your check SHOULD be and watch to make sure adjustments are made.
7. If you receive both SSI and a Title II disability benefits, report earnings twice – once to the SSI program and again to the Title II program. If you call SSA tell them you are on BOTH SSDI and SSI so they record it in both programs.
8. If you are getting checks that you are not entitled to – do NOT spend them! Deposit them in the bank while you work with SSA to get your income accounted for.
9. Self-Employment situations are very different from wage employment in terms of how income is reported to SSA and when it is reported. Get assistance from your local Community Work Incentives Coordinator to make sure you are keeping proper records.
10. Keep receipts for all of the specific work incentives you are claiming. SSI recipients should submit receipts during the annual redetermination. Title II beneficiaries should submit receipts when a work CDR is being conducted.

SSA has a Wage Reporting Reminder which sends an email or text reminders to report monthly wages for SSI. It is at <http://www.socialsecurity.gov/ssiwagereporting/>.