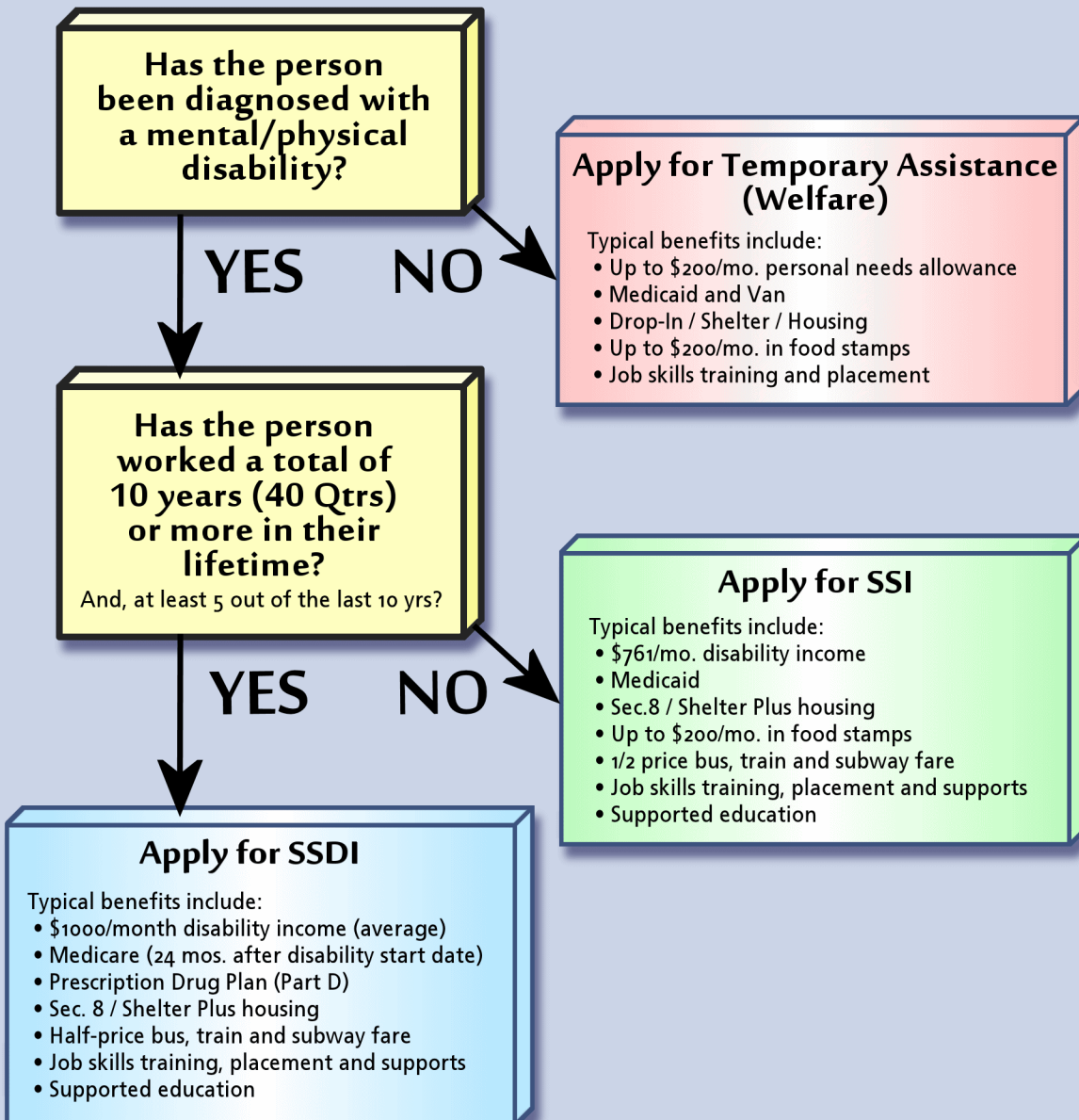


Determining Eligibility for Benefits



Demystifying Government Work Incentives

The eight work incentive programs summarized below focus on single adults (18-64), living alone. Though the Social Security Administration continues to claim these incentives are effective, less than one-half of one percent of the over twelve million SSI & SSDI Recipients ever work their way off their benefits. (SSA, 2007, Annual Statistical Report)

Ticket to Work And Self-Sufficiency Program

What it does: Allows beneficiaries to attempt to work above SGA (\$700/Mo.) without fear of triggering a review of their disability status (CDR) for a period of five years

Eligibility: Adult SSI & SSDI Recipients (18-64)

Restrictions: Must earn at least \$670/mo. for three months in year two, for six months in year three and for nine months in year four & five, to maintain (CDR) exemption. Must continue to meet earned income caps; \$980/Mo. for SSDI (no resource cap) and \$1,640/Mo. for SSI Recipients; \$2,000 resource cap

Current # of Enrollees: One tenth of one percent (2008)

Reference: SSA.Gov; Publication No. 05-10060, January 2009

1619 (B) Extended Medicaid Coverage

What it does: Extends Medicaid coverage beyond the break-even point (\$1640/Mo.) up to the threshold amount (\$43,636/Yr. in NYS). "It does not help a working recipient keep more of his/her SSI cash payment"

Eligibility: SSI Recipients who earn at least \$1,640/Mo. (\$19,680/Yr.)

Restrictions: "Individuals who are utilizing the Section 1619 (b) work incentive provision do not receive SSI payments - because their income is over the "Break-Even Point" (\$1,640/Mo.)"

Current # of Enrollees: One percent of the almost six million SSI Recipients

Reference: SSA.Gov; Publication No. 05-10095, January 2009

Pass Plan

What it does: Allows SSI beneficiaries to set aside earned income which will reduce their dependence on SSI, e.g. education, job training, a computer, a car, etc. and, not have these monies count as SGA income or resources

Eligibility: SSI Recipients

Restrictions: Funds can only be used for the specified services or items. Detailed records and receipts must be kept. Some expenditures may be denied

Current # of Enrollees: Less than one percent. None in NYS

Reference: SSA.Gov; Publication No. 05-11017, January 2009

Impairment Related Work Expenses

What it does: Reduces countable earnings (thereby increasing the monthly SSI benefit) for work related expenses, e.g. attendant care, transportation, drugs and medical services, physical therapy, etc.

Restrictions: Must be work related, paid by recipient and not reimbursable by Medicaid, Medicare, family, etc. No time limit

Current # of Enrollees: 2% of all SSI Enrollees

Reference: SSA; 2009 Redbook

Subsidies

What it does: The employer pays more in wages than the value of the services performed, e.g. a higher pay scale, shorter hours, fewer or easier job duties, extra job supports, OJT training, less or lower quality work, frequently absent, etc.

Eligibility: SSI & SSDI Recipients. Any type of employment; sheltered, supported or private

Reference: SSA.Gov; 2009 Redbook

Medicaid Buy-In

What it does: Allows SSI Recipients to earn up to \$55,188/yr. and retain up to \$13,800 in resources and avoid the Medicaid spend-down and, still keep all their Medicaid benefits. Current moratorium on premiums

Eligibility: Medicaid Recipients who are working

Current # of Enrollees: 6,000 in '08

Reference: www.health.state.ny.us/medicaid buy-in

Work Opportunity Tax Credit

What it does: A federal tax credit of up to \$2,400 for employers who hire workers with disabilities

Reference: www.doleta.gov

HUD Earned Income Disallowance

What it does: Excludes earned income from HUD's 30% rent increase rule; 100% in year one, 50% in year two

Reference: www.hud.gov/housing choice voucher program

Case Manager's Benefits Guide

❖ For Single Adults 18-64 ; Living Alone ❖

EXAMPLE

SSDI

SSI

TA

Social Security Disability Insurance
Disability *and* 10 Years or more of Lifetime Wages

Supplemental Security Income
Disability *and* Less than 10 Years Lifetime Wages

Welfare / Temporary Assistance
No Physical or Mental Disability

- ❖ **Eligibility:** A medical disability that prevents you from engaging in competitive employment for the next twelve months and, where you have forty quarters or more of work history. Other restrictions may apply
Go to: www.ssa.gov, then print out form: SSA-3368-BK
Call 1-800-772-1213 for an appointment
Most applications are denied and must be appealed; see "Legal" below
- ❖ **Wage Limit:** \$980/Mo. No limit for 1st twelve months; No Resource Limit
Average award: \$1000/mo.
- ❖ **Medical:** Medicare/HMO; covers inpatient, outpatient and drug plan (up to \$2700/Yr) Co-pays. Application included in SSA-3368BK. 24 month wait
Call Medicare @ 1-800-633-4227 with questions
- ❖ **Psychiatric Emergencies:** Police/Fire: 911
Mobile Crisis Team • Suicide Prevention Hotline
- ❖ **Education, Job Training and Employment:**
VESID • Department of Labor
One-Stop Employment Center • Also; www.craigslislist.org
- ❖ **Food:** See "Food Pantries" in phone book
SSDI recipients are usually not eligible for Food Stamps
- ❖ **Transportation:** Disabled ½ Fare Card
½ Fare Train/Subway/Bus Pass
Para Transit
- ❖ **Temporary Housing:**
 - » **Drop-in;** no wait, no cost, call DSS
 - » **Shelter;** no wait, must sign over SSI/SSDI checks, call DSS
 - » **Y'M's/Y'W's;** \$450-695/Mo. • See phone book
 - » **Supported;** homeless and psychiatric disability call DCMH
Also see Case Managers Housing Guide @ www.economicsofrecovery.org
 - » **Utilities;** "Special Service"
- ❖ **Legal:** SSA appeals:
Legal Aid Society; 1-888-218-6974 • Law Schools; see phone book
- ❖ **Forms:** Available @ www.economicsofrecovery.org/form-link

- ❖ **Eligibility:** A medical disability that prevents you from engaging in competitive employment for the next twelve months and, where you have forty quarters or more of work history. Other restrictions may apply
Go to: www.ssa.gov, then print out form: SSA-3368-BK
Call 1-800-772-1213 for an appointment
Most applications are denied and must be appealed; see "Legal" below
- ❖ **Wage Limit:** \$1640/Mo. Can keep ½ of gross earned income over \$85/Mo.
Resource Limit: \$2000/Mo. Average payment: \$761/mo.
- ❖ **Medical:** Medicaid; covers inpatient (Hospital), outpatient, drugs and dental
Co-pays. Application included in SSA-3368BK
Call DSS with Medicaid questions
- ❖ **Psychiatric Emergencies:** Police/Fire: 911
Mobile Crisis Team • Suicide Prevention Hotline
- ❖ **Education, Job Training and Employment:**
VESID • Department of Labor
One-Stop Employment Center • Also; www.craigslislist.org
- ❖ **Food Stamps:** Up to \$200/Mo.; Form: LDSS-4826
Call DSS
- ❖ **Transportation:** Disabled ½ Fare Card
½ Fare Train/Subway/Bus Pass
Para Transit • Medicaid Van: call DSS
- ❖ **Temporary Housing:**
 - » **Drop-in;** no wait, no cost, call DSS
 - » **Shelter;** no wait, must sign over SSI/SSDI checks, call DSS
 - » **Y'M's/Y'W's;** \$450-695/Mo. • See phone book
 - » **Supported;** homeless and psychiatric disability call DCMH
Also see Case Managers Housing Guide @ www.economicsofrecovery.org
 - » **Utilities;** "Special Service"
- ❖ **Legal:** SSA appeals:
Legal Aid Society; 1-888-218-6974 • Law Schools; see phone book
- ❖ **Forms:** Available @ www.economicsofrecovery.org/form-link

- ❖ **Eligibility:** Persons in need; poverty, homeless, substance/ alcohol abuse. Call DSS for appt.; Form LDSS-2921
- ❖ **Wage Limit:** \$90/Mo. with prior approval by DSS
Resource Limit: \$2000/Mo. (\$3000 if 60+)
\$200/Mo. max. personal needs allowance
- ❖ **Medical:** Medicaid; covers inpatient (Hospital), outpatient, drugs and dental
Co-pays. Application included in LDSS-2921
Call DSS with Medicaid questions
- ❖ **Emergencies:** Police/Fire: 911
Suicide Prevention Hotline
- ❖ **Education, Job Training and Employment:**
Department of Labor
One-Stop Employment Center • Also; www.craigslislist.org
- ❖ **Food Stamps:** Up to \$200/Mo.; Form: LDSS-2921 or LDSS-4826
Call DSS
- ❖ **Transportation:** Medicaid Van: call DSS
- ❖ **Temporary Housing:**
 - » **Drop-in;** no wait, no cost, call DSS
 - » **Shelter;** no wait, must sign over SSI/SSDI checks, call DSS
 - » **Y'M's/Y'W's;** \$450-695/Mo. • See phone book
 - » **Supported;** call DCMH
Moving, furniture allowance, security deposit, call DSS
 - » **Section 8;** County Office, 30% of income
See Case Managers Housing Guide @ www.economicsofrecovery.org
 - » **Utilities;** "Special Service"
Telephone; "LifeLine"
- ❖ **Legal:** DSS appeals:
Fair Hearing
Legal Aid Society; 1-888-218-6974 • Law Schools; see phone book
- ❖ **Forms:** Available @ www.economicsofrecovery.org/form-link

DSS = Dept. of Social Services. DCMH = Dept. of Community Mental Health.
SSA = Social Security Admin. VESID = State Vocational Agency. DOL = Dept. of Labor.



Guide to Disability Evaluation

Name _____ Counselor _____ Date _____

The questions below concern how your mental and/or physical impairments affect your ability to function in your daily life. Your answers will help your Doctor complete your Disability Application (SSA-3368BK) or to prepare for SSA's Disability Review (CDR).

Please check off all those activities listed below that you are unable to complete successfully because of your disability.

Daily Living:	Unable To Do	I Would Rate My Impairment As:			Has Lasted For More Than 12 Mo.	Expect To Last For Next 12 Mo.
		Extreme	Severe	Moderate		
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cleaning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taking Public Transp.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Paying Bills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintain Apartment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grooming & Hygiene	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Using the Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Using the Post Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Do You Usually Get Along With Your:						
Family Members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Neighbors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grocery Clerks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Landlord	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bus Driver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Co-Workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supervisors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I Have Difficulty With:						
Concentrating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completing Tasks on Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor Memory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor Work Quality/Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fatigue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working With Numbers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not Completing Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extra Training or Supervision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequent Rest Periods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Continued ...



Please check off all those activities listed below that you are unable to complete successfully because of your disability.

<i>I Often Have The Need For:</i>	<i>Unable To Do</i>	<i>I Would Rate My Impairment As:</i>			<i>Has Lasted For More Than 12 Mo.</i>	<i>Expect To Last For Next 12 Mo.</i>
		<i>Extreme</i>	<i>Severe</i>	<i>Moderate</i>		
More Medications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More Work Supports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More Home Supports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More Program Supports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hospitalization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Abuse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequent Episodes of Verbal Abuse Outbursts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Current Medical Problems:

Please check off all that apply.

<input type="checkbox"/> None	<input type="checkbox"/> Hyperlipidermia (High Cholesterol)
<input type="checkbox"/> Arthritis/joint disorder	<input type="checkbox"/> Hypertension (High Blood Pressure)
<input type="checkbox"/> Asthma	<input type="checkbox"/> Neurological
<input type="checkbox"/> Cancer	<input type="checkbox"/> Obesity
<input type="checkbox"/> Coronary Artery Disease	<input type="checkbox"/> Osteoporosis
<input type="checkbox"/> Dementia/Organic Brain Disorder	<input type="checkbox"/> Renal/Renal Dialysis
<input type="checkbox"/> Diabetes	<input type="checkbox"/> Sexually Transmitted Disease
<input type="checkbox"/> Female Reproductive Disorder	<input type="checkbox"/> Sleep Disorder
<input type="checkbox"/> Genital/Urinary Disorder	<input type="checkbox"/> TB
<input type="checkbox"/> Head Injury	<input type="checkbox"/> Ulcer/Gastrointestinal Disorder
<input type="checkbox"/> Hepatitis/Cirrhosis	<input type="checkbox"/> Unknown
<input type="checkbox"/> HIV/AIDS	<input type="checkbox"/> Other (specify) _____

Current Medications:

<u>MEDICATION</u>	<u>DOSE</u>	<u>MEDICATION</u>	<u>DOSE</u>
1: _____		5: _____	
2: _____		6: _____	
3: _____		7: _____	
4: _____		9: _____	

Current Physician(s): _____ **Phone#:** _____

REFERENCE: SSA.GOV/BLUEBOOK



DOCUMENT CHECKLIST

Name _____

Counselor _____

Date _____

Check all those documents required, you have or need to get.

<u>IDENTITY/CITIZENSHIP/AGE</u>	<u>HAVE ORIGINALS</u>	<u>NEED TO GET</u>
<input type="checkbox"/> Birth Certificate/Baptismal Certificate	()	()
<input type="checkbox"/> Drivers License/Photo ID	()	()
<input type="checkbox"/> Social Security Card	()	()
<input type="checkbox"/> Passport/Permanent Resident Card	()	()
<input type="checkbox"/> Background Check; Finger Printing	()	()
<u>RESOURCES</u>		
<input type="checkbox"/> Bank Statements	()	()
<input type="checkbox"/> Insurance Policies	()	()
<input type="checkbox"/> Titles/Registration; Auto, etc.	()	()
<input type="checkbox"/> Property Deed	()	()
<input type="checkbox"/> Burial Contract	()	()
<u>INCOME/RESOURCES</u>		
<input type="checkbox"/> Wage Stubs (4 Weeks)	()	()
<input type="checkbox"/> Employer Letter; Rate, Hours, Dates	()	()
<input type="checkbox"/> Tax Return/Records	()	()
<input type="checkbox"/> Cancelled Checks	()	()
<u>WORK</u>		
<input type="checkbox"/> Resume	()	()
<input type="checkbox"/> Rates of Pay	()	()
<input type="checkbox"/> Diplomas/Certificates	()	()
<input type="checkbox"/> School Records	()	()
<u>RESIDENCY</u>		
<input type="checkbox"/> Lease/Shelter Letter	()	()
<input type="checkbox"/> Landlord Letter	()	()
<input type="checkbox"/> Rent Receipt	()	()
<input type="checkbox"/> Utility Bills	()	()
<input type="checkbox"/> ID With Current Address	()	()
<u>MEDICAL/DISABILITY</u>		
<input type="checkbox"/> Health Records	()	()
<input type="checkbox"/> Doctor's & Hospitals: Names, Address, Phone #'s, Dates, Treatments, etc.	()	()
<input type="checkbox"/> Medicaid/Medicare/HMO Card	()	()
<input type="checkbox"/> SSI/SSDI Benefits Letter	()	()
OTHERS _____		
_____	()	()

DISABILITY REPORT - ADULT - Form SSA-3368-BK

PLEASE READ ALL OF THIS INFORMATION BEFORE YOU BEGIN
COMPLETING THIS FORM

THIS IS ~~NOT~~ AN APPLICATION

IF YOU NEED HELP

If you need help with this form, do as much of it as you can, and your interviewer will help you finish it. However, if you have access to the Internet, you may access the Disability Report Form Guide at <http://www.socialsecurity.gov/disability/3368/index.htm>.

HOW TO COMPLETE THIS FORM

The information that you give us on this form will be used by the office that makes the disability decision on your disability claim. You can help them by completing as much of the form as you can.

- Please fill out as much of this form as you can before your interview appointment.
- Print or write clearly.
- **DO NOT LEAVE ANSWERS BLANK.** If you do not know the answers, or the answer is "none" or "does not apply," please write: "don't know," or "none," or "does not apply."
- **IN SECTION 4, PUT INFORMATION ON ONLY ONE DOCTOR/HMO/THERAPIST/ OTHER/HOSPITAL/CLINIC IN EACH SPACE.**
- Each address should include a ZIP code. Each telephone number should include an area code.
- **DO NOT ASK A DOCTOR OR HOSPITAL TO COMPLETE THE FORM.** However, you can get help from other people, like a friend or family member.
- If your appointment is for an interview by telephone, have the form ready to discuss with us when we call you.
- If your appointment is for an interview in our office, bring the completed form with you or mail it ahead of time, if you were told to do so.
- When a question refers to "you," "your" or the "Disabled Person," it refers to the person who is applying for disability benefits. If you are filling out the form for someone else, please provide information about him or her.
- Be sure to explain an answer if the question asks for an explanation, or if you want to give additional information.
- If you need more space to answer any questions or want to tell us more about an answer, please use the "REMARKS" section on Pages 9 and 10, and show the number of the question being answered.

ABOUT YOUR MEDICAL RECORDS

If you have any medical records and copies of prescriptions at home for the person who is applying for disability benefits, send them to our office with your completed forms or bring them with you to your interview. Also, bring any medicine containers with you. If you need the records back, tell us and we will photocopy them and return them to you.

YOU DO NOT NEED TO ASK DOCTORS OR HOSPITALS FOR ANY MEDICAL RECORDS THAT YOU DO NOT ALREADY HAVE. With your permission, we will do that for you. The information we ask for on this form tells us to whom we should send a request for medical and other records. If you cannot remember the names and addresses of any of the doctors or hospitals, or the dates of treatment, perhaps you can get this information from the telephone book, or from medical bills, prescriptions and medicine containers.

WHAT WE MEAN BY "DISABILITY"

"Disability" under Social Security is based on your inability to work. For purposes of this claim, we want you to understand that "disability" means that you are unable to work as defined by the Social Security Act. You will be considered disabled if you are unable to do any kind of work for which you are suited and if your disability is expected to last (or has lasted) for at least a year or to result in death. So when we ask, "when did you become unable to work," we are asking when you became disabled as defined by the Social Security Act.

The Privacy And Paperwork Reduction Acts

The Social Security Administration is authorized to collect the information on this form under sections 205(a), 223(d) and 1631(e)(1) of the Social Security Act. The information on this form is needed by Social Security to make a decision on the named claimant's claim. While giving us the information on this form is voluntary, failure to provide all or part of the requested information could prevent an accurate or timely decision on the named claimant's claim. Although the information you furnish is almost never used for any purpose other than making a determination about the claimant's disability, such information may be disclosed by the Social Security Administration as follows: (1) to enable a third party or agency to assist Social Security in establishing rights to Social Security benefits and/or coverage; (2) to comply with Federal Laws requiring the release of information from Social Security records (e.g., to the Government Accountability Office and the Department of Veterans Affairs); and (3) to facilitate statistical research and such activities necessary to assure the integrity and improvement of the Social Security programs (e.g., to the Bureau of the Census and private concerns under contract to Social Security).

We may also use the information you give us when we match records by computer. Matching programs compare our records with those of other Federal, State, or local government agencies. Many agencies may use matching programs to find or prove that a person qualifies for benefits paid by the Federal government. The law allows us to do this even if you do not agree to it.

Explanations about these and other reasons why information you provide us may be used or given out are available in Social Security offices. If you want to learn more about this, contact any Social Security office.

PAPERWORK REDUCTION ACT: This information collection meets the requirements of 44 U.S.C. § 3507, as amended by Section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 60 minutes to read the instructions, gather the facts, and answer the questions. **SEND OR BRING THE COMPLETED FORM TO YOUR LOCAL SOCIAL SECURITY OFFICE. The office is listed under U. S. Government agencies in your telephone directory or you may call Social Security at 1-800-772-1213 (TTY 1-800-325-0778).** *You may send comments on our time estimate above to: SSA, 6401 Security Boulevard, Baltimore, MD 21235-6401. Send only comments relating to our time estimate to this address, not the completed form.*

PLEASE REMOVE THIS SHEET BEFORE RETURNING THE COMPLETED FORM.

**DISABILITY REPORT
ADULT**

For SSA Use Only
Do not write in this box.

Related SSN _____
Number Holder _____

SECTION 1- INFORMATION ABOUT THE DISABLED PERSON

A. NAME (First, Middle Initial, Last)

B. SOCIAL SECURITY NUMBER

C. DAYTIME TELEPHONE NUMBER (If you do not have a number where we can reach you, give us a daytime number where we can leave a message for you.)

() - Your Number Message Number None
Area Code Number

D. Give the name of a friend or relative that we can contact (other than your doctors) who knows about your illnesses, injuries or conditions and can help you with your claim.

NAME _____ RELATIONSHIP _____

ADDRESS _____
(Number, Street, Apt. No.(If any), P.O. Box, or Rural Route)

_____-_____-_____- DAYTIME () -
City State ZIP PHONE Area Code Number

E. What is your height without shoes?
feet inches

F. What is your weight without shoes?
pounds

G. Do you have a medical assistance card? (For Example, Medicaid YES NO or Medi-Cal) If "YES," show the **number** here: _____

H. Can you speak and understand English? YES NO If "NO," what is your preferred language? _____

NOTE: If you cannot speak and understand English, we will provide an interpreter, free of charge.

If you cannot **speak and understand English**, is there someone we may contact who speaks and understands English and will give you messages? YES NO (If "YES," and that person is the same as in "D" above show "SAME" here. If not, complete the following information.)

NAME _____ **RELATIONSHIP** _____

ADDRESS _____
(Number, Street, Apt. No.(If any), P.O. Box, or Rural Route)

_____-_____-_____- **DAYTIME** () -
City State ZIP PHONE Area Code Number

I. Can you read and understand English? YES NO

J. Can you write more than your name in English? YES NO

Disability Report-Adult-Form SSA-3368-BK

SECTION 2
YOUR ILLNESSES, INJURIES OR CONDITIONS AND HOW THEY AFFECT YOU

A. What are the **illnesses, injuries, or conditions** that limit your ability to work? _____

B. How do your illnesses, injuries, or conditions limit your ability to work? _____

C. Do your illnesses, injuries or conditions cause you **pain** YES NO
or other symptoms?

D. When did your illnesses, injuries, or conditions **first interfere with your ability to work?**

<i>Month</i>	<i>Day</i>	<i>Year</i>
--------------	------------	-------------

E. When did you become **unable to work** because of your illnesses, injuries, or conditions?

<i>Month</i>	<i>Day</i>	<i>Year</i>
--------------	------------	-------------

F. Have you **ever worked?** YES NO *(If "NO," go to Section 4.)*

G. Did you **work at any time** after the date your illnesses, injuries, or conditions first interfered with your ability to work? YES NO

- H. If "YES," did your illnesses, injuries, or conditions cause you to: *(check all that apply)*
- work fewer hours?** *(Explain below)*
 - change your job duties?** *(Explain below)*
 - make any job-related changes such as your attendance, help needed, or employers?** *(Explain below)*

I. Are you **working now?** YES NO

If "NO," when was the last day you worked?

<i>Month</i>	<i>Day</i>	<i>Year</i>
--------------	------------	-------------

J. Why did you **stop working?** _____

SECTION 3 - INFORMATION ABOUT YOUR WORK

A. List all the jobs that you had in the 15 years before you became unable to work because of your illnesses, injuries or conditions.

JOB TITLE (Example, Cook)	TYPE OF BUSINESS (Example, Restaurant)	DATES WORKED (month & year)		HOURS PER DAY	DAYS PER WEEK	RATE OF PAY (Per hour, day, week, month or year)	
		FROM	TO				
						\$	
						\$	
						\$	
						\$	
						\$	
						\$	

B. Which job did you do the longest? _____

C. Describe this job. What did you do all day? (If you need more space, write in the "Remarks" section.) _____

D. In **this job**, did you:

- Use machines, tools or equipment? YES NO
- Use technical knowledge or skills? YES NO
- Do any writing, complete reports, or perform duties like this? YES NO

E. In **this job**, how many total hours each day did you:

- Walk? _____ Stoop? (*Bend down & forward at waist.*) _____ Handle, grab, or grasp big objects? _____
- Stand? _____ Kneel? (*Bend legs to rest on knees.*) _____ Reach? _____
- Sit? _____ Crouch? (*Bend legs & back down & forward.*) _____ Write, type, or handle small objects? _____
- Climb? _____ Crawl? (*Move on hands & knees.*) _____

F. Lifting and Carrying (*Explain what you lifted, how far you carried it, and how often you did this.*) _____

G. Check **heaviest** weight lifted:

- Less than 10 lbs 10 lbs 20 lbs 50 lbs 100 lbs. or more Other _____

H. Check weight **frequently** lifted: (*By frequently, we mean from 1/3 to 2/3 of the workday.*)

- Less than 10 lbs 10 lbs 25 lbs 50 lbs. or more Other _____

I. Did you supervise other people in this job? YES (Complete items below.) NO (If NO, go to J.)
How many people did you supervise? _____

What part of your time was spent supervising people? _____
Did you hire and fire employees? YES NO

J. Were you a lead worker? YES NO

SECTION 4 - INFORMATION ABOUT YOUR MEDICAL RECORDS

- A. Have you been seen by a **doctor/hospital/clinic** or anyone else for the illnesses, injuries or conditions that limit your ability to work? YES NO
- B. Have you been seen by a **doctor/hospital/clinic** or anyone else for emotional or mental problems that limit your ability to work? YES NO

If you answered "NO" to both of these questions, go to Section 5.

C. List **other names** you have used on your medical records. _____

Tell us who may have medical records or other information about your illnesses, injuries or conditions.

D. List each **DOCTOR/HMO/THERAPIST/OTHER**. Include your **next appointment**.

1

NAME			DATES
STREET ADDRESS			FIRST VISIT
CITY	STATE	ZIP	LAST VISIT
PHONE () -	PATIENT ID # (If known)		NEXT APPOINTMENT
<small>Area Code</small>		<small>Phone Number</small>	
REASONS FOR VISITS _____			
WHAT TREATMENT WAS RECEIVED? _____			

2

NAME			DATES
STREET ADDRESS			FIRST VISIT
CITY	STATE	ZIP	LAST VISIT
PHONE () -	PATIENT ID # (If known)		NEXT APPOINTMENT
<small>Area Code</small>		<small>Phone Number</small>	
REASONS FOR VISITS _____			
WHAT TREATMENT WAS RECEIVED? _____			

SECTION 4 - INFORMATION ABOUT YOUR MEDICAL RECORDS

DOCTOR/HMO/THERAPIST/OTHER

3. NAME			DATES	
STREET ADDRESS			FIRST VISIT	
CITY	STATE	ZIP	LAST VISIT	
PHONE () -	PATIENT ID # (If known)		NEXT APPOINTMENT	
<small>Area Code</small>		<small>Phone Number</small>		
REASONS FOR VISITS				
WHAT TREATMENT WAS RECEIVED?				

If you need more space, use Section 9 - Remarks.

E. List each HOSPITAL/CLINIC. Include your next appointment.

1.	HOSPITAL/CLINIC		TYPE OF VISIT	DATES	
NAME		<input type="checkbox"/> INPATIENT STAYS <i>(Stayed at least overnight)</i>	DATE IN	DATE OUT	
STREET ADDRESS					
CITY		<input type="checkbox"/> OUTPATIENT VISITS <i>(Sent home same day)</i>	DATE FIRST VISIT	DATE LAST VISIT	
STATE	ZIP				
PHONE () -		<input type="checkbox"/> EMERGENCY ROOM VISITS	DATES OF VISITS		
<small>Area Code</small>			<small>Phone Number</small>		

Next **appointment** _____ Your hospital/clinic **number** _____

Reasons for visits _____

What **treatment** did you receive? _____

What **doctors** do you see at this hospital/clinic on a regular basis? _____

SECTION 4-INFORMATION ABOUT YOUR MEDICAL RECORDS

HOSPITAL/CLINIC

2. HOSPITAL/CLINIC			TYPE OF VISIT	DATES	
NAME			<input type="checkbox"/> INPATIENT STAYS <i>(Stayed at least overnight)</i>	DATE IN	DATE OUT
STREET ADDRESS					
CITY	STATE	ZIP	<input type="checkbox"/> OUTPATIENT VISITS <i>(Sent home same day)</i>	DATE FIRST VISIT	DATE LAST VISIT
		-			
PHONE () -			<input type="checkbox"/> EMERGENCY ROOM VISITS	DATES OF VISITS	
Area Code Phone Number					

Next **appointment** _____ Your hospital/clinic **number** _____

Reasons for visits _____

What **treatment** did you receive? _____

What **doctors** do you see at this hospital/clinic on a regular basis? _____

If you need more space, use Section 9 - Remarks.

F. Does **anyone else** have **medical records or information** about your illnesses, injuries, or conditions (Workers' Compensation, insurance companies, prisons, attorneys, welfare), or are you scheduled to see anyone else?

YES (If "YES," complete information below.)

NO

NAME			DATES
STREET ADDRESS			FIRST VISIT
CITY	STATE	ZIP	LAST VISIT
		-	
PHONE () -			NEXT APPOINTMENT
Area Code Phone Number			
CLAIM NUMBER (if any) _____			
REASONS FOR VISITS _____			

If you need more space, use Section 9 - REMARKS.

SECTION 5 - MEDICATIONS

Do you currently take any **medications** for your illnesses, injuries or conditions? YES
 If "YES," please tell us the following: *(Look at your medicine containers, if necessary.)* NO

NAME OF MEDICINE	IF PRESCRIBED, GIVE NAME OF DOCTOR	REASON FOR MEDICINE	SIDE EFFECTS YOU HAVE

If you need more space, use Section 9 - Remarks.

SECTION 6 - TESTS

Have you had, or will you have, any **medical tests** for illnesses, injuries, or conditions?
 YES NO If "YES," please tell us the following: *(Give approximate dates, if necessary.)*

KIND OF TEST	WHEN WAS/ WILL TESTS BE DONE? (Month, day, year)	WHERE DONE? (Name of Facility)	WHO SENT YOU FOR THIS TEST?
EKG (HEART TEST)			
TREADMILL (EXERCISE TEST)			
CARDIAC CATHETERIZATION			
BIOPSY -- Name of body part _____			
HEARING TEST			
SPEECH/LANGUAGE TEST			
VISION TEST			
IQ TESTING			
EEG (BRAIN WAVE TEST)			
HIV TEST			
BLOOD TEST (NOT HIV)			
BREATHING TEST			
X-RAY -- Name of body part _____			
MRI/CT SCAN -- Name of body part _____			

If you have had other tests, list them in Section 9 - Remarks.

SECTION 7-EDUCATION/TRAINING INFORMATION

A. Check the highest grade of **school** completed.

Grade school:

0 1 2 3 4 5 6 7 8 9 10 11 12 GED

College:

1 2 3 4 or more

Approximate **date** completed: _____

B. Did you attend **special education** classes? YES NO (If "NO," go to part C)

NAME OF SCHOOL _____

ADDRESS _____

(Number, Street, Apt. No.(if any), P.O. Box or Rural Route)

City State ZIP

DATES ATTENDED _____ TO _____

TYPE OF PROGRAM _____

C. Have you completed any type of **special job training, trade or vocational school**?

YES NO If "YES," what type? _____

Approximate date completed: _____

**SECTION 8 - VOCATIONAL REHABILITATION, EMPLOYMENT,
or OTHER SUPPORT SERVICES INFORMATION**

Have you participated, or are you participating in:

- an individual work plan with an employment network under the Ticket to Work Program;
- an individualized plan for employment with a vocational rehabilitation agency or any other organization;
- a Plan to Achieve Self-Support;
- an individualized education program through an educational institution (if a student age 18-21); or
- any program providing vocational rehabilitation, employment services, or other support services to help you go to work?

YES (Complete the information below) NO

NAME OF ORGANIZATION OR SCHOOL _____

NAME OF COUNSELOR OR INSTRUCTOR _____

ADDRESS _____

(Number, Street, Apt. No.(if any), P.O. Box or Rural Route)

City State ZIP

DAYTIME PHONE NUMBER () - _____

Area Code Number

DATES SEEN _____ TO _____

TYPE OF SERVICES,
TESTS OR EVALUATIONS
PERFORMED _____

(IQ, vision, physicals, hearing, workshops, classes, etc.)

