

## **SSA Paperwork and Work Income Reporting: What to Expect**

Throughout the course of the year, Social Security requires specific paperwork to be completed. Most of these packets can be done by our Account Managers without needing the client present. There may be times when we receive documents such as a Medical Reviews or Work History reports that will require some help from our clients/professionals. In these instances we will contact the client/professional and notify what documents are needed or will schedule an appointment. Time is of the essence once paperwork is received from Social Security, so it is important to follow up with your Account Manager as soon as possible.

**Medical Reviews**-In the event that a Medical Review packet has been requested by SSA, the designated Account Manager will contact the client/professional to schedule an appointment. At this appointment it will be necessary to have all information pertaining to the clients medical history including but not limited to, medications, doctor appointment dates, etc. Benefits can be discontinued for not turning these packets in. It is critical these are done in a timely manner.

**Clients Who Work**- It is very important that if a client is employed, paystubs must be turned in to the Social Security Administration (SSA) regularly. Once PayCo is the payee we become responsible for reporting work income. Paystubs must be turned in to the designated Account Manager and we will forward to SSA. The IRS reports all work income to SSA, so there is no hiding work income.

If paystubs are not turned in, there is a chance that SSA will estimate your work wages, which in turn affects your benefit check. If SSA is estimating, there is also a chance they are estimating too high and the client will ultimately suffer as a result of this. Meaning benefits could be higher if paystubs were turned in correctly. On the other side, Social Security could estimate the work wages too low, which would result in an overpayment. Meaning the client would have to pay back money to Social Security. For someone who receives SSI benefits, this could be very hindering.

If we receive a Work History redetermination there is a possibility that SSA will ask for paystubs for many years in the past. Your Account Manager will assist you in obtaining these documents to the best of our ability, but ultimately it will be the client's responsibility to give us the necessary documents. In the event the documents are not turned in, benefits can be cut completely or reduced drastically due to estimations.