

Part II Chapter 12 – Intake Services and Benefits Verification

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Chapter 12 – Intake Services and Benefits Verification

Learning Objectives

After you have read this chapter and completed the associated lectures and activities during WIPA Initial Training, you should be able to:

1. Describe why thorough information gathering and benefits verification are essential components of WIPA services.
2. Identify categories of information CWICs need to gather from beneficiaries in order to provide accurate and complete benefits analysis.
3. Describe the process for conducting an effective intake interview.
4. Describe strategies for conducting efficient and effective intake interviews.
5. Identify which benefits CWICs need to verify prior to providing work incentives counseling.
6. Describe when to verify benefits and describe basic strategies for verification.
7. Describe what the Benefits Planning Query (BPQY) report is, how to request this report from Social Security, and the limits to this report.
8. Describe how to document benefits verification.

List of Acronyms

- AWIC – Area Work Incentives Coordinator
- BPQY – Benefits Planning Query
- BS&A – Benefits Summary and Analysis
- DCF – Disability Control File
- EN – Employment Network
- EPE – Extended Period of Eligibility
- IRWE – Impairment Related Work Expenses

- LIHEAP – Low Income Heat and Energy Assistance Program
- LIS – Low-Income Subsidy
- MBR – Master Beneficiary Record
- MSP – Medicare Savings Program
- SNAP – Supplemental Nutrition Assistance Program
- TANF-Temporary Assistance to Needy Families
- TWP – Trial Work Period
- VR – Vocational Rehabilitation
- WIL – Work Incentives Liaison

Importance of Information Gathering

In order to provide in-depth benefits analysis and thorough work incentives counseling, CWICs must begin by conducting an intake interview to gather comprehensive information about all benefits an individual receives that paid employment could affect. CWICs cannot provide high quality individualized WIPA services without first investing time and effort in gathering and verifying all relevant information. Keep in mind that not all beneficiary situations require individualized services. CWICs should only conduct intake interviews to collect information with beneficiaries who are appropriate and for and interested in individualized WIPA services.

Required Information Gathering Form

Social Security requires the Ticket to Work Help Line to use a standard form to gather a minimum amount of data about each beneficiary they refer for individualized benefits analysis and work incentives counseling. This form is “Help Line WIPA Referral (SSA-4567)”. The Ticket to Work Help Line completes the SSA-4567 when they refer beneficiaries directly to WIPA programs. That referral will include most of the contact information you need to reach out to a beneficiary during your initial call, plus information about the type of Social Security benefits the person receives and their current employment status.

Conducting Initial Calls

CWICs gather the information necessary for benefits analysis by conducting structured interviews with beneficiaries in person, over the

phone, or by using distance technology. Prior to conducting the intake interview CWICs should complete the initial call. The initial call should accomplish the following tasks in this order:

1. **Confirm the referral for WIPA services** - Make sure the beneficiary understands why the Help Line referred them and provide a brief explanation of WIPA services.
2. **Verify eligibility for WIPA services** –The Help Line will have already screened for eligibility, but if you accept referrals from other sources, you will need to verify eligibility yourself.
3. **Verify that the beneficiary requires individualized WIPA services** – Remember that individualized WIPA services are most useful for eligible beneficiaries who are already employed, have a job offer pending, are actively engaged in a job search, or are a transition youth under age 18. You need to determine that beneficiaries are appropriate for individualized services before you start gathering all the information on the SSA-4565.

The SSA-4565 is a form SSA developed for WIPA programs to use to gather information CWICs need to provide services. The SSA-4567 and SSA-4565 are similar but separate forms. You will find that some of the information fields on the SSA-4565 are duplicative of what you receive from the Help Line on the SSA-4567. You will need to complete all the fields on the SSA-4565 for a full intake. The SSA-4567 Help Line WIPA Referral form is not a complete intake document.

Note: Social Security has combined these forms in a single document, but requires approval from the Office of Management and Budget to use it. They will release the updated, combined, form as soon as they receive permission.

4. **Explain next steps in the process** of providing individualized WIPA services including having beneficiaries sign releases of information needed to verify benefits and scheduling a time to conduct an intake interview.

Tips for Sending Releases and a Welcome Packet

Before you end the initial call, make sure the beneficiary understands that you must first verify all of the benefits they receive before providing individualized counseling. Here are some tips for helping the beneficiary understand what to expect next:

- Let beneficiaries know that you will be mailing them a Welcome Packet with several release forms that they should sign and return to you. For each release, be sure to explain what information you will gather and how you will use this information in the process of providing services. Stress the importance of returning the required forms back to you quickly, so you can move forward with individualized counseling.
- Explain that the benefits verification process can be a bit slow sometimes and encourage the beneficiary to call you as questions arise.
- Review what the beneficiary should expect from you once you verify the benefits. You will review the BPQY and other verification documents with the beneficiary and you may need to ask some additional questions at that time. CWICs may need to explain the need for additional verification depending on the beneficiary's answers.
- Repeat that the most valuable part of WIPA services is the individualized counseling and on-going services. Explain that you will go over how the employment or earnings goal is likely to affect their benefits. You will explain everything verbally, and then summarize it in a special report called a Benefits Summary and Analysis report or BS&A report.
- Thank the beneficiary for their time. End the conversation with information about when the beneficiary can expect to hear from you again. Specifically, a reminder statement about the date and time of the intake interview. Always encourage the beneficiary to contact you with questions or concerns as they may arise.

Tips for Conducting Effective Intake Interviews

The purpose of the intake interview is to meet with the beneficiary to gather all information needed to complete the WIPA Intake form SSA-4565. The interview also gives you an excellent opportunity to get to know the beneficiary and establish trust. The interview should be a conversation with the beneficiary – not just a series of standard questions that might feel more like an interrogation.

To help you get started, we provide an **Initial Interview Guide** for CWICs on the NTDC website at <https://vcu-ntdc.org/resources/viewContent.cfm?contentID=197>. This guide provides scripting that will help you become familiar with conducting interviews. In the meantime, here are some practical tips for conducting effective intake interviews:

1. You may not be able to complete the intake interview in one meeting. Be sure to ask the beneficiary how much time they have before you begin so you know in advance. Take your time gathering the information you need and check to make sure the beneficiary is not getting tired or feeling the need to end the meeting. Schedule a time to meet again if you are not able to cover all the bases in one meeting.
2. Be sure to complete the entire interview process using the SSA-4565 as a guide. Do not skip questions unless you are certain they do not apply to the beneficiary. For example, questions about unearned income and resources might not be relevant to Title II beneficiaries. Before you end the meeting, double check to make sure you have all of the information you need.
3. It is helpful to explain why you need information that some beneficiaries may be reluctant to provide. For example, if you ask an SSI recipient about bank accounts or other resources, that might feel intrusive. Be sensitive to the fact that you are asking for some very personal information. When beneficiaries understand how you will use the information, there is a greater likelihood they will be comfortable sharing their information.
4. Do not provide a lot of general work incentives information in the intake interview, as this may discourage the beneficiary from engaging in individualized services. More importantly, you may

- be giving the right answer to the wrong question. For example, someone may misunderstand the type of benefit he or she receives, and you could give misinformation for that person's situation. Another example, you could provide information about Trial Work Period to a beneficiary with work that Social Security has not reviewed. Explain that you cannot provide accurate counseling until you have a complete understanding of their unique benefits situation.
5. Do not provide individualized benefits counseling until after you have gathered information and verified benefits. Make sure the beneficiary understands that providing counseling based on current and accurate information is in their best interests.
 6. Make sure you have all of the contact information you need to communicate effectively with the beneficiary, including correct landline and cell phone numbers, email addresses, and mailing addresses. Be sure to ask beneficiaries which methods of contact they prefer and make a note about that in your SSA-4565. When beneficiaries provide an email address, ask if they check email regularly. If calling is the preferred method of contact, ask about the best times to call. When beneficiaries provide a cell phone number, check to see if they prefer calls or text messages. If a beneficiary uses a transcription or videophone service, ensure you have the information and that you use that method of communication. Be sure to provide your contact information to the beneficiary as well.
 7. End the interview by asking beneficiaries if they have any questions or concerns. Make sure beneficiaries know what the next steps are in the process, so they know what to expect from you moving forward.

Gathering Information about Current Employment

For employed individuals, do not assume that the job they currently have is the one they eventually want, or that it is the only one they have had since entitlement to benefits. One of your primary objectives is to support beneficiaries to achieve improved financial stability. An important way to

achieve this result is moving up the career ladder or retooling to attain a higher paying job. In order to help beneficiaries achieve future employment or earnings goals, you need to know their employment goals.

Helping beneficiaries connect with the employment services and supports that would help them to achieve their career goals is an important part of a CWIC's job. Determine which services a beneficiary is already receiving and gather specific information about other agencies or professionals the beneficiary accesses. As you work through the interview, you may need to explain how the State VR agency works or answer questions about other employment service providers (e.g. Employment Network, American Job Center, or Center for Independent Living) – even if the beneficiary is already participating in those services. Be prepared to review the Ticket to Work program, what it means to have a Ticket in assignment or in use with the State VR agency or an EN. You should take your time with this part of the interview and fully explain how the employment services system for people with disabilities works so beneficiaries know what to expect.

Ask specific questions about existing employment barriers (e.g. inability to navigate public transportation or unstable housing) or unmet vocational service needs. This applies to all beneficiaries for whom you plan to provide individualized WIPA services, even if they are already involved with an EN or State VR agency.

Gathering Information about Past Employment

Past employment since entitlement is important because it could have some bearing on current benefits. SSI recipients may not have reported past earnings, which would indicate the possibility of an overpayment. For a Title II disability beneficiary, past employment may mean that they have already used Trial Work Period (TWP) or Extended Period of Eligibility (EPE) months, or performed Substantial Gainful Activity and may have an overpayment.

Beneficiaries may not remember when they worked, the names and addresses of companies, or even how much they earned. Research into past employment since entitlement can be time consuming, as it generally requires requesting information from the Social Security field office. Many times, even Social Security's information is incorrect or incomplete, because beneficiaries may not have reported their wages reliably. Social

Security developed the Benefits Planning Query (BPQY) to help work incentives counselors understand the person's situation as recorded by Social Security. We provide detailed information on the BPQY later in this chapter.

During the interview, assure beneficiaries that it is okay if they are unclear about the details of the past work, as you can work on that later on if needed. At this point, you just need a basic list of the different jobs the person may have had, an idea about the timeframe the beneficiary worked in those jobs, and an estimate of how much the person may have earned. Be aware that this conversation may cause some anxiety – be sensitive to that possibility. Beneficiaries may be nervous of the impact past employment might have on their current benefits. CWICs should remain supportive and explain how they will use this information in providing individualized counseling.

Gathering Information about Dependent Family Members who also receive Social Security or Other Benefits

Many of the beneficiaries you will serve are members of families, with dependent children or a spouse living in the same household. Some dependent family members also receive benefits that income or resources affect. Changes in household income may affect eligibility for these benefits or the benefit amount. When disability beneficiaries go to work, their earned income may affect the benefits of dependent family members. Since families tend to pool their resources to pay the household expenses, you must consider how an employment goal will affect the entire family unit. Be sure to double check on dependent family members with every beneficiary and explain why you need the information. Be aware that some beneficiaries may not accurately know what benefits family members get or how much the benefit payments are. These situations will require extra benefits research and verification.

Gathering Information about Health Insurance and Healthcare Needs

Income and resources may affect some forms of health insurance, including Medicaid. In some cases, beneficiaries may be more concerned about losing health insurance than they are about losing cash benefits. One of the most difficult aspects of gathering information about health insurance is how many different programs there are and how little beneficiaries understand about what programs they (or their dependent family members) have. In particular, there are many ways to qualify for Medicaid. A beneficiary may even be enrolled in more than one Medicaid program at the same time. Work affects different Medicaid programs in different ways, so it is important that you research the Medicaid program in the beneficiary's state of residence and that you know exactly which type of Medicaid beneficiaries and their dependent family members get. Begin by asking questions about forms of government funded health insurance or healthcare since earnings will most likely affect these programs. This includes Medicare, Medicaid, and the VA healthcare system.

When Information Gathering Should Go Beyond the Usual Requirements

Certain groups of beneficiaries have issues that require you to have additional information. In these cases, gather the basic information recommended above and then gather supplemental information as needed. Two populations in particular tend to require supplemental information gathering: veterans and transition-age youth.

Veterans

The Department of Veterans Affairs (VA) provides a host of special benefits to veterans of the U.S. Armed Forces in addition to the basic cash benefit programs. Because there are so many different programs, spend extra time and effort when interviewing veterans to make certain you have gathered all of the information you need. A **Veterans Information Gathering Tool** is available on the VCU NDTC website to guide this interview process (<https://vcu-ntdc.org/resources/viewContent.cfm?contentID=78>)

Transition Age Youth

Social Security considers beneficiaries who are between the ages of 14 and 25 to be transition-age youth. Youth nearing age 18 may require a special interview in addition to the basic information-gathering process to identify potential problems or opportunities. CWICs can use the **Age 18 Benefits Check-up for Transition Age Youth: A Guide for Students, Families, and Professionals** (<https://vcu-ntdc.org/resources/viewContent.cfm?contentID=71>) to track the changes that might occur when a transition-age youth reached the age of 18.

Other beneficiaries with complicated benefits situations may also require extra research. For example, SSI eligible couples with children who receive benefits can present very complex situations. In addition, beneficiaries who receive uncommon forms of benefits such as Railroad Retirement or Black Lung benefits may require additional information gathering. Be as thorough as possible when interviewing beneficiaries before beginning your analysis and counseling.

Strategies for Performing Information Gathering

The WIPA service model directs CWICs to provide services via distance methods wherever possible. In the face of limited resources and larger service areas, providing services using distance technology is efficient and cost effective. Social Security supports the use of teleconferencing, videoconferencing, Zoom, FaceTime, and related technologies to meet with beneficiaries. Although Social Security does not prohibit face-to-face meetings with beneficiaries, you should only use them when distance communication techniques are not possible or appropriate.

You can conduct the intake services process very successfully by phone. Here are some tips:

- When you make initial contact with a beneficiary, ask for a phone appointment to conduct an intake interview. You never know what you might be interrupting when you make that first call, and you cannot expect the beneficiary to be available right then for an intake interview. Explain what the intake service process is and why it is necessary. Be sure you and the beneficiary have set

aside enough time to conduct the intake interview. It is common for the intake interview to take one hour.

- You may need several sessions to gather all of the necessary information from the beneficiary. It is best practice to keep calls to an hour. Set up the next session before you complete the call if you need to gather more information.
- Have a conversation. It is possible to gather the information you need by simply having a friendly chat. Try not to read any information-gathering templates or interview guides you use, but spend time getting to know the person, and rephrase the questions in conversational language. CWICs can gather and document information within the SSA-4565 according to the flow and direction of the conversation with the beneficiary. The information does not need to be gathered in the exact order in which presented within the SSA-4565. The goal is to establish trust and rapport while gathering the information you need to perform in-depth individualized benefits analysis.
- Never mail or email the SSA-4565 to the beneficiary and ask them to fill it out and return it to you. Social Security designed the SSA-4565 for CWICs to complete. You will learn much more about the beneficiary and end up with fewer informational gaps if you conduct the interview with the beneficiary. The answers to many of the questions within the SSA-4565 may lead to a CWIC to ask follow up questions and gather additional information.
- Some of the questions you pose may seem intrusive. Be sure to explain why you need information when a beneficiary seems reluctant to answer. Take your time and answer questions about the process as you move through it. If a beneficiary does not want to answer certain questions, do not pressure them. Make a note to follow-up on that question later and move on.

The intake process is complete once you have completed the Initial Call, sent out the Welcome Packet and releases, and conducted the intake interview to gather all necessary information to complete the SSA-4565.

Verifying Benefits

Verifying the information you gathered during the intake interview process is a required and critical step for WIPA services. Benefits verification may begin as soon as a beneficiary returns releases. This may occur before, during or after the intake interview is complete. Individualized counseling should only occur after you verify all of a beneficiary's benefits from a reliable source.

The alternative - trying to offer benefits advice based on unverified information - is extremely dangerous business. The risk of error is high, and the consequences can be severe for the beneficiary. It is common for beneficiaries to have inaccurate, incomplete, or out-of-date information about the benefits they receive. You cannot simply take self-reported information at face value without checking it. Admittedly, benefits verification takes time, and sometimes a significant amount of time. It is far better to move slowly and dispense correct information than to respond quickly with incorrect advice. It may be necessary to explain this clearly to beneficiaries to help them understand why services take time.

When to Verify Benefits

Before writing a Benefits Summary and Analysis (BS&A) report or telling the beneficiary how the employment goal may affect benefits, you must verify all benefits that paid employment could affect. In some circumstances, it may be necessary to re-verify benefits as well. If a beneficiary returns for additional individualized services several months later, you will need to review their benefits to determine if changes may have occurred and if you need to update verifications. The general rule is that if it has been six months or more since you last verified benefits, plan to conduct a new intake interview and re-verify all benefits. If it has been less than six months since you last verified benefits, discuss what may have changed with each benefit. If there has only been a change in one of the benefits, it is only necessary to re-verify that one. If there is any doubt as to whether a change has occurred, re-verify.

What to Verify

You must verify all public benefits the beneficiary receives, including:

- All Social Security benefits, including SSI state supplements

- Medicare – all parts including Part C Advantage Plans or Dual Special Needs Plans
- Medicare Savings Programs (MSPs)
- Medicaid – all forms including Medicaid Home and Community-based waivers
- Supplemental Nutrition Assistance program (SNAP)
- Temporary Assistance for Needy Families (TANF)
- Federal rental assistance or other housing programs that paid employment could affect
- Worker’s Compensation
- Unemployment Insurance
- Veterans Pension/Compensation
- Low Income Home Energy Assistance Program (LIHEAP)
- Black Lung benefits, and Railroad Retirement benefits
- If a beneficiary is receiving a private benefit, such as a private long-term disability or private health insurance and he or she has concerns about how work will affect that benefit, you must work with the beneficiary to contact the benefit administrator and verify the benefit and impact of working.
- Other Healthcare Coverage-Employer-Private, VA, TriCare, etc.

It is not enough to verify that the beneficiary receives a benefit. Be prepared to verify information such as entitlement date, amount of benefit, time-limited income exclusions, and use of special programs within a benefit program. Because each benefit program is unique, what you may need to verify will differ from one program to another.

In most situations, the benefits you are verifying are those of the beneficiary you are serving. In some situations, though, it may be necessary to verify a spouse’s benefits or children’s benefits. If a beneficiary’s spouse or dependent children are receiving public benefits and the beneficiary has concerns about how working will affect those, you must verify those benefits as well. CWICs should obtain an additional signed release to verify these additional benefits.

How to Verify Benefits

The first step in verifying benefits is to explain to the beneficiary why you need to verify their benefits and obtain signed releases of information. You will need a release of information to verify each benefit the beneficiary, their spouse, or children receives. To obtain verification from Social Security, you are required to use their specific release of information form: Consent for Release of Information, form number SSA-3288. You may find other agencies that administer benefits also require the use of their specific release of information form, while others may allow the WIPA agency's general release of information.

The second step is to contact the agency that administers the benefit. How you communicate with the agencies will differ from one to another. The following section provides some details on how to communicate with the most common federal benefit programs to obtain verification. Because there are numerous state and local benefits that you must verify, you will need to identify the process for verifying these state or local benefits for your service area. Establishing the means for verifying benefits requires an effort of networking and relationship building on your part. In most agencies administering benefits, personnel have substantial workloads and that can result in delays in responding to requests for benefit verification. In these situations, you will need to build and use a network to find alternate avenues or approaches for obtaining verification. Be sure to meet with your WIPA Program Director before you start verifying benefits to make sure you understand the exact strategy to use with each agency.

The third step in verifying benefits is to review all verifications to determine if there are any inconsistencies with the information the beneficiary shared about their situation. Sometimes, the verification information will raise additional questions. It is a critical part of your job to know how to identify these issues and how to correct them. Make sure you know the best contact within each agency to answer questions. For example, a CWIC might have to contact the WIL or AWIC to answer questions.

You can find a **Benefits Verification Quick Reference Guide** on the VCU NTDC website at <https://vcu-ntdc.org/resources/viewContent.cfm?contentID=226>. This useful tool provides a detailed list of all the benefits you should verify with specific instruction about how to go about requesting verification.

Verifying Social Security Disability Benefits – the Benefits Planning Query (BPQY)

The Social Security Administration's BPQY (SSA-2459) contains comprehensive information about an individual's disability benefits and work activity that Social Security has reviewed. This includes the status of the beneficiary's Social Security administered disability cash benefits, Medicare, Medicaid (in some situations) scheduled medical reviews, representative payee, last work review action, and some work history (if reported and reviewed). In essence, the BPQY provides a snapshot of the beneficiary's benefits and work history as stored in Social Security's electronic records.

CWICs can use several methods to request a BPQY. A beneficiary may request his or her own BPQY directly by calling the national toll-free number at 1-800-772-1213 (TTY 1-800-325-0778). Another option is to have the CWIC request a BPQY from Social Security by submitting proper authorization. Social Security requires CWICs to submit the SSA-3288 Release of Information form when requesting a BPQY. This is the only form for requesting a BPQY, because it meets all the criteria for disclosure of Social Security information and records required by Social Security regulations.

Social Security will assume the consent is for a one-time only disclosure unless the beneficiary documents on the SSA-3288 that Social Security can disclose records beyond the one time. The beneficiary must document on the SSA-3288 the timeframe in which Social Security can disclose the information (for example, disclose information for one year from the date I signed this form). If you have follow-up questions about the BPQY and the original SSA-3288 does not document the timeframe for the consent to disclose information, you will need a second release requesting specific information. This is always true if you are requesting more information about an overpayment.

An important resource for CWICs is the Benefits Planning Query Handbook (BPQY) Handbook. The BPQY Handbook is a Social Security publication that includes information on the purpose of the BPQY, how to request a BPQY, and explains the details of each section of the BPQY. The **BPQY Handbook** is available on the Social Security website (https://www.ssa.gov/disabilityresearch/documents/BPQY_Handbook.pdf).

The BPQY Handbook also includes an SSA-3288 exhibit with the appropriate information for requesting a BPQY inserted. We also provide you with a **Sample SSA-3288 for Requesting BPQYs** on the VCU NTDC website (<https://vcu-ntdc.org/resources/viewContent.cfm?contentID=232>). CWICs should use this pre-populated form when requesting BPQYs from Social Security.

Send the completed release form to the beneficiary's local Social Security office with a specific request for the BPQY. Some Social Security offices require WIPA projects to submit all releases to a central point of contact (such as the WIL or Office Manager). Other offices allow you to send the releases directly to Claims Specialists or Service Representatives. Be sure to research how each local office in your service area prefers you to submit BPQY requests, and follow the proper procedure for each office.

The Area Work Incentive Coordinator (AWIC) is also a valuable resource if you have challenges receiving BPQYs or other information from the local Social Security office. The AWIC provides training and technical support to the local offices on work incentive issues, and he or she may know how best to obtain the BPQY.

Additional tips for obtaining BPQYs in a timely manner:

1. Develop a good working relationship with the local WIL. Ask how long you should expect to wait for BPQYs.
2. Follow proper protocol. If the office accepts faxes, fax the releases. If they require original signatures, mail or hand-deliver releases. Some WIPA programs have established secure email and can email releases. CWICs should check with their WIPA manager to determine if their program is a Social Security approved secure email partner. If you do not receive the BPQY in the expected timeframe, follow up with Social Security, and submit a second request if necessary. It is a good idea to retain a copy of the releases you submit.
3. Ask beneficiaries to get the BPQY themselves by calling Social Security's toll-free number, or, if the beneficiary is able, by visiting the local Social Security field office.

Reviewing the BPQY

Social Security generates the BPQY by pulling from several different data sources. If any information in these data systems is outdated or incorrect,

the information on the BPQY will be outdated. For example, if the beneficiary did not report earnings or if they did report, but Social Security has not yet processed a work CDR, the work incentive information on the BPQY may be outdated. Even when a beneficiary receiving Title II reports using electronic methods, the earnings will not become part of the BPQY until a Social Security Claims Technician has made a decision about the effect of those earnings on the person's benefits through a work CDR. You can help identify errors in any item on the BPQY by bringing this to the beneficiary's attention and helping them resolve this through the local Social Security office, the WIL, or the AWIC, depending on the service structure in your area, to avoid future misunderstandings or potential overpayments. A notice to the beneficiary, or subsequent BPQY should confirm that Social Security made the correction(s). It is important to keep in mind that the BPQY, as with all verifications, is a starting point. You must review it carefully for inconsistencies or missing information.

Social Security's BPQY Handbook explains the details of each section of the BPQY. In general, when you examine the BPQY, you should take these steps to try to answer questions or resolve concerns:

1. Contact the beneficiary or their representative and ask questions about the information on the BPQY. You need to know if it matches what the beneficiary remembers about their work history. In some cases, this simple step will provide the information you need to resolve the mystery at hand. If not, move on to the next step.
2. Many of the resolutions to BPQY problems will come from contact with the WIL in the local office, or possibly the AWIC. These Social Security employees have access to the computer files and may be able to look up the question and answer it. Make sure you have a signed release of information before you make a request of this nature. You may need to complete an additional SSA-3288 for any questions you ask about the BPQY.
3. An additional resource for verifying basic Social Security benefit information is the "my Social Security" online portal system. Beneficiaries can go to Social Security's website and create a personalized account, which they can use to print a benefit verification letter. The beneficiary will also be able to see their record of annual earnings, benefit amount, and payment information. Beneficiaries can also change their address, phone

number, and direct deposit through this portal. Beneficiaries can sign in or create an account using the following link:
www.ssa.gov/myaccount.

Limits to the BPQY

The BPQY is a critically important tool CWICs use to verify benefits, but it does not contain all of the information you may need. You will need to conduct additional information gathering and verification in the following areas:

1. **Ticket Assignment:** In advising beneficiaries about their Ticket to Work and the medical continuing disability review protection, there is some key information you need to verify. You need to confirm when the beneficiary assigned their Ticket (month and year), to whom their Ticket is currently assigned, when their last Timely Progress Review occurred, and if their Ticket is considered in "active" status. You can verify this information by contacting the Ticket to Work Help Line at 1-866-968-7842 when the beneficiary is with you in person or on conference call. Ticket Call Center personnel cannot speak with you unless the beneficiary is present.
2. **Medicaid:** Since Social Security does not administer the Medicaid program, there is very little the BPQY can tell you about someone's Medicaid status. Verify Medicaid status by contacting the Medicaid agency in the state where the beneficiary lives. Be sure to discuss methods for contacting the state Medicaid agency with your WIPA Program Manager.
3. **Medicare:** The BPQY can verify that a beneficiary is enrolled in Parts A and B with the dates of enrollment. It can also verify whether the state is paying the Medicare Part B premium. The BPQY does not provide you with any information about Parts C or D. It also will not tell you which Medicare Savings Program an individual has— only that the state is paying the premium. The best way to verify Medicare information is to have the beneficiary call the Medicare toll-free line at 1-800-MEDICARE. Beneficiaries can also set up a **"my Medicare" online account** by going to the Medicare website at <https://www.medicare.gov/account/create-account>.

Interpreting BPQYs will take time for you to master. To get started, you should refer to a useful resource document entitled **Tips for Interpreting BPQYs** on the NTDC website at <https://vcu-ntdc.org/resources/viewContent.cfm?contentID=222>.

Verifying Other Benefits

Remember, providing benefit information or advice without verifying the benefit status can result in you providing harmful misinformation to the beneficiary. While the BPQY can verify a substantial amount of information, most beneficiaries have additional benefits that provide critical supports. You must also verify these benefits, which means the process for verification generally involves more than just obtaining the BPQY. You should begin by reading a resource document entitled **Benefits Verification Quick Reference Guide** (<https://vcu-ntdc.org/resources/viewContent.cfm?contentID=226>). The next step is to meet with your WIPA Program Director to find out how to verify the various benefits in the state(s) where the beneficiary lives.

Documenting Verifications

CWICs keep documentation of verification in the beneficiary's record for any beneficiary receiving individualized services. This documentation could include copies of BPQYs, statements of benefits or other correspondence that verifies the public benefits they received, current benefits status, payment amounts, and the work incentives the beneficiary used. When verifying benefits through a conversation with an agency representative (such as when calling the Medicare call center), CWICs should record the conversation in a case note, form SSA-4566. The SSA-4566 should include the date of the conversation, the name of the person with whom you spoke, and details about what information you verified. We also provide a **Verbal Benefits Verification Form** on the NTDC website at <https://vcu-ntdc.org/resources/viewContent.cfm?contentID=235>. CWICs should always complete a SSA-4566 to document the verification. Additionally, copies of relevant releases of information should be on file to verify that the beneficiary granted permission to obtain information from agencies.

Next Steps

We have provided you with an overview about information gathering through the Intake Interview and verification in the WIPA program. You will need to confer with your WIPA Program Director to learn more about your agency's approach to this essential task.