

Social Security Advocacy Services Newsletter

March/April 2024

Social Security Advocacy Services (SSAS) is dedicated to assisting Minnesotans with the Social Security disability benefits process so they can secure stable housing, live in dignity, and achieve their highest potential.



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Social Security Advocacy Services team member spotlight

We would like to introduce you to our newest team member, Mary Berard.

Mary joined DHS in March 2024 as Interim Assistance Policy and System Analyst. This is a new position within our team. She will be working with Dawn Holmen on DHS Interim Assistance Reimbursement (IAR) program. She is excited to be here and looking forward to working with her new team.



Mary is a Bemidji State University Alumni where she graduated with a degree in Business Administration emphasizing in marketing and management. She comes to DHS from Itasca County Health and Human Services where she was employed for the last 10 years. Her previous work with Itasca County included child protection services ongoing case manager, fraud prevention investigator, and lead long term care financial eligibility specialist.

Mary is a lifelong resident of Grand Rapids, MN, where she is married with two adult children. She enjoys traveling and just about anything outdoors.

You can contact Mary at InterimAssistance.DHS@state.mn.us with any interim assistance questions or issues.

Grantee spotlight

This section of our newsletter spotlights a Department of Human Services-contracted Social Security Advocacy Services grantee in hopes of fostering partnerships and open communication among all grantees.



Agency Name: Minnesota Department of Veteran Affairs

Contact information: 651-296-2562

Website: www.minnesotaveteran.org

Service provided:

The Minnesota Department of Veterans Affairs (MDVA) SSI/SSDI Outreach, Access, and Recovery (SOAR) program has provided services to military families throughout the state of Minnesota since 2016. The Veteran SOAR team helps Veterans with financial stability as part of the State's mission to prevent and end Veteran homelessness. The program offers disability claims representation to Veterans or spouses of Veterans who are experiencing or at risk of homelessness at the initial, reconsideration, and hearing levels. The program also assists this population with filing retirement applications or connecting to the Social Security Administration (SSA) for other benefits.

MDVA uses the national SOAR model and tailors the experience to meet the unique needs of the Veteran community. The six Veteran SOAR representatives are all Minnesota residents with active-duty military service. Besides helping Veterans with SSA benefit applications, they connect their clients to other potential Veteran benefit programs including healthcare, compensation and pension, state benefits, and the statewide Homeless Veteran Registry (HVR). The two senior staff also serve as SOAR local leads in the metro area.

The MDVA SOAR program utilizes many community partnerships and the statewide HVR to identify potential SOAR candidates. SOAR staff meet on a regular basis with various Veteran offices, nonprofit agencies, and other local partners throughout the state. Through these partnerships, they collectively come together to help Veterans overcome the barriers they face.

Contract spotlight: Submission of data to State

The General Duties section, 2.4.1.D, states a grantee must enter and upload information into the Social Security Advocacy Services (SSAS) payment system. Section D.2 states that a grantee must upload an individual's completed SSA-1696 to the SSAS payment system within

ninety (90) days of submitting an application/claim at any level or a continuing disability review or within ninety (90) days of becoming an individual's authorized representative



for Social Security Administration purposes. To say this a different way, you must upload a completed SSA- 1696 form to the SSAS payment system within 90 days of submitting a client's application/appeal/CDR to SSA **OR** you must upload a completed SSA-1696 form to the SSAS payment system within 90 days of signing/dating the SSA-1696 form. We also encourage you to review all of section 2.4.1.D which provides further details of the submission process.

Additionally, the SSA-1696 form must be completed as defined in section 2.4.1.B in your contract with DHS. This [recorded training](#) and [handout](#) shows you how to correctly complete the SSA-1696 form.

It is very important that you are aware of all the services and deliverables within your agency's contract with the Department of Human Services. If you do not have a copy of your agency's current contract, please contact your assigned coordinator for a copy.

SSAS invoice approval summary

February 2024

A total of 118 invoices submitted by 19 grantees were approved.

Initial application/reconsiderations	88
ALJ hearing level	28
Appeals Council level	1
Continuing Disability Review (CDR)	1
CDR at ALJ hearing level	0

March 2024

A total of 113 invoices submitted by 20 grantees were approved.

Initial application/reconsiderations	85
ALJ hearing level	25

Appeals Council level	0
Continuing Disability Review (CDR)	1
CDR at ALJ hearing level	2

Reporting changes to DHS

Grantees should inform their assigned coordinator of any new staff or staff who are leaving that correspond on a regular basis with DHS, changes in contact information, and changes in any services provided. It is important for DHS to have current information on file for each contracted grantee. If you do not know who your assigned coordinator is, please send an email to DHS.SSAadvocacy@state.mn.us.

Supplemental Security Income changes

The Social Security Administration (SSA) has published two new final rules in the Federal Register which changes how in-kind support and maintenance (ISM) is calculated. ISM is unearned income in the form of food or shelter, or both. SSA considers ISM when determining SSI eligibility and payment amounts.



Under the [first final rule](#), SSA will no longer consider food expenses when calculating ISM. In the [second final rule](#), SSA is expanding the rental subsidy exception nationwide that has until now been available only in seven states. Both of these rules go into effect on 9/30/2024.

Social Security Advocacy Services team trainings



Technical Assistance (TA) bi-monthly sessions

On the third **THURSDAY** in odd months from 1:30 to 3 p.m., the Social Security Advocacy Services team offers trainings and opportunities for Q&A to our contracted Social Security advocates.

Our next technical assistance training will be **Thursday, May 16, 2024**. Jon Norberg from the Social Security Administration will be presenting on *Overpayments and Waivers*. You can register for this technical assistance session at this [link](#).

If you are interested in presenting at an upcoming TA session on any topic related to Social Security advocacy services, please contact Tony Reynero at antonio.reynero@state.mn.us.

Social Security Administration trainings

Social Security has announced their annual continuing education courses for eligible direct pay non-attorney representatives (EDPNA). These trainings are free and available to anyone. Trainings for the fiscal year 2024 include:



- Citizen vs Non-Citizens General Reminder
 - [Course summary](#)
 - [View the video](#)
- Digestive Disorders
 - [Course summary](#)
 - [View the video](#)
- Skin Disorders
 - [Course summary](#)
 - [View the video](#)

Social Security Administration updates



Program Operations Manual (POMS) updates

In recent months, Social Security has announced many updates to POMS. Some notable changes include priority cases, development of consultative examinations, notice instructions, and income rules for Supplemental Security Income (SSI). For further information on these changes visit Social Security's website for [POMS Recent Changes](#).

Overpayment recovery rate reduced

Effective 3/25/2024, the Social Security Administration has reduced the recovery rate for overpayments. For further information read this [press release](#).

Program policy instructions

In recent months, Social Security has issued many emergency messages with program policy instructions. Some notable changes include protective filing dates, adverse medical reopenings, and overpayments. For further information on these changes visit Social Security's website for [Emergency Messages](#).

Social Security Advocacy Services resources

Additional resources can be found at the Minnesota Department of Human Services webpage [Social Security Advocacy Services: Policies and procedures for contracted grantees](#).
