

## Updates about Social Security: What You Need to Know

### NASW Practice Alert April 2022



Image description: A paper entitled “Social Security Benefits Application” rests on a desk. A pen, calculator, and pair of eyeglasses are on top of the application.

Social Security is integral to the well-being and economic security of individuals, families, and communities. The Social Security Administration (SSA) currently supports [more than 70 million people](#) through one or more of the following programs:

- [retirement benefits](#)
- [Social Security Disability Insurance](#) (SSDI)
- [Supplemental Security Income](#) (SSI)
- [survivors benefits](#) (also known as “spouses benefits”)

Moreover, SSA [enrolls people in original Medicare](#) (Part A and Part B). Considering the breadth of Social Security, most people will benefit from the program at some point in their lives.

Social workers play integral roles in helping clients understand, access, and navigate Social Security benefits. NASW met with SSA representatives individually and within a coalition context during the first quarter of 2022. This Practice Alert provides updates on recent developments within SSA. It concludes with NASW advocacy related to Social Security.

#### SSA Field Office Reopenings

On April 4, 2022, SSA announced that local Social Security offices (also known as field offices) will restore in-person services, both with and without appointments, three days later (April 7, 2022). The SSA Web site lists a small number of offices that may [continue to require appointments](#).

An [SSA blog post](#) includes important tips for people who plan to visit a Social Security office and who wish to reach SSA by phone. NASW encourages social workers to disseminate this SSA blog post to clients who may require assistance with Social Security.

National-level SSA representatives conveyed other details regarding field office reopenings to NASW and other members of the [Leadership Council of Aging Organizations](#) (LCAO) during a meeting on March 23, 2022:

- SSA has a page listing [physical addresses and phone numbers for its local offices](#). However, the agency encourages individuals to use the national toll-free number, 1-800-772-1213 (TTY for people who are deaf or hard of hearing: 1-800-325-0778), for appointment scheduling and other inquiries.
- People who plan to visit a Social Security field office must read and adhere to a [self-assessment checklist](#) to reduce the risk of COVID-19 transmission.
- [People who need assistance or lack childcare](#) may bring one adult or children, respectively, into the local office.
- Local offices will have separate waiting lines for people with and without appointments. Individuals who wish to make an appointment will need to wait in the same line as others without appointments.
- SSA is employing multiple strategies to mitigate client waiting times and staffing shortages: use of volunteers and reemployment of SSA retirees to help staff some field offices in which demand for services is high; national workload sharing plan to shift work to among offices; streamlining of certain administrative processes; and continuous monitoring of and adjustment to service delivery processes, especially during the next six months.
- SSA maintains an extensive list of [questions and answers related to the impact of COVID-19](#) on the agency's service delivery.
- SSA has posted a frequently asked question addressing [how to schedule, reschedule, or cancel an appointment](#). This page also links to online applications for disability, retirement, survivors, and Medicare benefits.

### Online Accounts

SSA encourages all individuals to establish [my Social Security online accounts](#). These accounts enable all users to request a replacement Social Security card. People who are not receiving benefits can use *my Social Security* not only to download their annual Social Security statements, but also to obtain personalized estimates for their own retirement benefits, their spouse's benefits, and check the status of an application. Social Security beneficiaries can use the online accounts to set up or change direct deposit, print a benefit verification letter, change an address, and obtain a Social Security 1099 (SSA-1099) form. Furthermore, SSA provides [materials for groups and organizations](#) for advocates and service providers who wish to conduct more extensive education and outreach on *my Social Security*.

Recognizing that many individuals do not have reliable, secure access to broadband or smartphones, NASW has advocated for SSA to [continue postal mailings of annual earnings statements](#) to people who contribute to Social Security. Other NASW advocacy activities are listed at the end of this Practice Alert.

## People Facing Barriers

Over the past two years, SSA has made efforts to reach people for whom field office closures have been particularly problematic. These groups include people with low incomes, limited English proficiency, or mental illness and people facing homelessness. The SSA page [Outreach Materials for People Facing Barriers](#) includes links to the following information, which remains pertinent as local Social Security offices reopen:

- guide to SSI for groups and organizations
- public-facing eligibility guide regarding SSI
- Web site for people who are blind or have low vision
- Web site for people who are deaf or hard of hearing
- Web site for faith-based and community groups
- outreach resources and materials regarding SSI for kids.

SSA also posts information to support people facing barriers on its [Social Security Matters blog](#).

## Helping Clients Apply for SSI

SSA is launching a new online tool this month to help people begin the process of filing for SSI benefits. This tool, [Request an Appointment to File for Benefits](#), requires five to 10 minutes of time and online submission of basic information. Such information may be submitted by the individual themselves or by a third party, such as a social worker, on a client's behalf. SSA will then contact the individual within seven to 14 business days by e-mail (if provided) or postal mail with the date and time of an appointment.

On the date of the scheduled appointment, the SSA representative will help the individual apply for SSI (and, if appropriate, for other Social Security benefits). SSA will generally offer phone appointments first but will accommodate in-person appointments at local offices upon request from the individual or if phone assistance does not suffice. As one SSA employee noted, submission of a request for an appointment to file for benefits

is not an application. However, we may be able to use the date you [the individual] submitted the *Request Appointment to File for Benefits* as the date of the application, if the person submits the application and keeps the appointment. (This is what we call Protective Filing.) (L. Chevere, personal communication, April 6, 2022)

Moreover, SSA offers free training to instruct social workers in helping clients complete applications for SSI and SSDI. This training is another strategy to help connect people facing barriers to benefits and services. Initiated by SSA regional communications directors because of COVID-19-related field office closings, the trainings remain available. NASW asks social workers who are interested in participating in such a training to [e-mail the blog author](#), Chris Herman (*she/her/hers*), with their name, locality, state, and ZIP code.

## LGBTQIA+ Access

On February 17, 2022, SSA held a National Disability Forum (NDF) entitled [Equitable Access to SSA Disability Programs for LGBTQIA+ Communities](#). This two-hour virtual forum, which was open to the public, was part of an ongoing NDF series established by SSA to enable stakeholders to convey "their

unique insights on topics of particular interest to SSA early in the process and directly with policy makers” ([NDF home page](#), para. 2). The NDF page continues, “The activities under the NDF supplement, but do not replace, the rule-making process followed by SSA under the Administrative Procedure Act” (para. 3). The [NDF events page](#) includes the following materials from the February 17 forum: agenda, transcript, video, and bios for forum panelists, moderator, and SSA executives.

NASW is pleased that SSA is considering how to make access to SSDI and SSI more equitable for LGBTQIA+ communities. Following the February 17 forum, SSA invited NASW to provide feedback regarding the development of new public-facing products for same-sex partners who may qualify for Social Security survivors benefits. NASW looks forward to collaborating with SSA to support this effort.

Furthermore, SSA’s work to increase equitable access for LGBTQIA+ communities dovetails with two recent NASW advocacy efforts: (a) [urging Congress to enact policies to support low-income LGBTQIA+ communities in the federal budget](#) and (b) [urging policy leaders in the health, education, corporate, government, and other sectors to collect, analyze, and report LGBTQIA+ data on a routine basis](#).

### Scam Awareness

Social Security–related scams frequently occur via postal mail, phone, text message, email, and social media. Information about such scams is available both on an SSA [public-facing page](#) and on a page with [scam awareness materials for groups and organizations](#). Each page includes links to multiple resources, such as frequently asked questions regarding calls claiming problems with a person’s Social Security number or account, a *Social Security Matters* blog about Social Security–related scams by text message, tips for preventing and reporting fraud, public-oriented infographics (in English and Spanish) on scam alerts, and public service announcements for radio and television.

NASW encourages social workers to educate their clients about Social Security–related scams, especially when clients are interacting directly with SSA. By collaborating with clients and colleagues, social workers can help clients identify legitimate communication from SSA and avoid scams.

### NASW Advocacy

The NASW policy statement “Aging and Wellness” calls for “expansion of public and commercial systems of economic security for older adults, with particular attention to preserving and strengthening Social Security” ([Social Work Speaks: National Association of Social Workers Policy Statements 2021–2023 \[12th ed.\]](#), p. 45). In keeping with this principle, NASW has collaborated with other LCAO members to advocate for the following measures over the past two years:

- [full funding for SSA](#)
- enhancements to Social Security benefits and measures to extend the solvency of the Social Security Trust Funds without increasing taxes on people who earn less than \$400,000 per year ([Social Security 2100 Act](#))
- updating eligibility requirements for SSI, thereby enabling more people to benefit from the program ([SSI Restoration Act](#))
- protecting the right of a claimant to a fair hearing when appealing denial of Social Security disability benefits (overturning the previous Administration’s [rule on administrative law judges](#))

- fixing a coronavirus-related glitch that would significantly reduce retirement benefits for people born in 1960 and 1961 ([Social Security COVID Correction and Equity Act](#))
- protesting the deferral of employee payroll tax deductions for Social Security in 2020 ([letter to White House; Save Our Social Security Act](#))
- advocating for [automatic COVID-19 stimulus payments](#) to SSI beneficiaries in 2020.

The NASW-supported [LCAO Priorities for President-Elect Biden](#), sent to the Administration in late 2020, advocated for most items from the previous list and other measures to sustain and enhance Social Security.

### **Social Security Resources**

[Social Security Administration](#)

[National Committee to Preserve Social Security & Medicare](#)

[Alliance for Retired Americans](#)

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