

# Verification of Social Security & Other Public Benefits

## Tip Sheet 2018

When discussing work and benefits with consumers, verifying which ones are in the mix is key to leading them in the right direction.

Fortunately, there are several ways to formally verify a person's Social Security, state and public health insurance benefits including the following:

### **Social Security Disability Benefits:**

A Benefits Planning Query (BPQY) is a report produced by Social Security that informs Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) beneficiaries about their current benefit status. It contains detailed information about a beneficiary's:

- Disability onset & benefit entitlement dates
- Cash benefit monthly payment amount(s)
- Overpayment balance & any withholdings
- Next continuing disability medical review
- Rep Payee & Authorized Rep status
- Health insurance (Medicare & MassHealth)
- Work history & associated earnings

A beneficiary or someone else on their behalf, e.g. advocate(s), benefits counselors, Rep Payees, Authorized Representatives, and/or service organizations, can request a BPQY either from the local Social Security office, or by calling the national toll free line at 1-800-772-1213.

Regardless of who requests the BPQY, it is best practice to reference it as *Form SSA-2459*.

Beneficiaries, Community Work Incentives Coordinators (CWICs), or certified benefits counselors, can request BPQYs at no charge.

For other third parties there is a fee, and they are required to submit 2 *Consent for Release of*

*Information forms (Form SSA-3288)*, filled out and signed by the consumer. These forms can be found here: [www.ssa.gov/forms/ssa-3288.pdf](http://www.ssa.gov/forms/ssa-3288.pdf).

### **Public Health Insurance: MassHealth**

MassHealth recipients can verify their active health plan by calling the 24/7 Self-Service Access phone line at 1-888-665-9993. To facilitate this process, have the consumer's Social Security Number (SSN) or 12-digit MassHealth identification number readily available.

Further, third parties can verify MassHealth benefits by having the consumer give verbal consent via a three-way call to a MassHealth Customer Representative, and/or they can complete and sign a *Permission to Share Information* form, which grants a person or agency the right to receive information about the individual. The form can be found here: ([www.mass.gov/eohhs/docs/masshealth/privacy/p\\_si.pdf](http://www.mass.gov/eohhs/docs/masshealth/privacy/p_si.pdf))

### **Public Health Insurance: Medicare**

Medicare recipients can access their personal information about benefits and services by registering for Medicare's free, secure online account portal at [www.mymedicare.gov/](http://www.mymedicare.gov/). When doing so, consumers must provide their Medicare number, the same address Social Security has on record, and the effective dates for Medicare Parts A and B. A confirmation letter will be sent and emailed to the recipient once registered.

In addition to this, Medicare recipients can always call 1-800-633-4227 to verify their benefits. To allow a third party to receive personal information,

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a Medicare Authorization to Disclose Personal Health Information ([www.cms.gov/Medicare/CMS-Forms/CMS-Forms/Downloads/CMS10106.pdf](http://www.cms.gov/Medicare/CMS-Forms/CMS-Forms/Downloads/CMS10106.pdf)) must be signed by the recipient.

### **Other Public Benefits: MAP**

Beneficiaries who are the head of the household (individual who signed the original application for benefits) will find that registering for a My Accounts Page (MAP) through the Virtual Gateway is the easiest way to verify their MassHealth coverage and any of their benefits administered by the Department of Transitional Assistance (DTA) including: Supplemental Nutrition Assistance Program (SNAP); Emergency Assistance to Elderly, Disabled and Children (EAEDC); Transitional Aid to Families with Dependent Children (TAFDC); and SSI State Supplement Payment (SSP).

To sign up for a MAP/Virtual Gateway account, visit [www.mass.gov/eohhs/consumer/basic-needs/vg/map/](http://www.mass.gov/eohhs/consumer/basic-needs/vg/map/).

### **Other Public Benefits: DTA Connect**

Beneficiaries who have smart phones, can now download the free DTA Connect mobile application to verify all of their DTA benefits. By simply entering their date of birth and Social Security Number, a beneficiary can get the following:

- Confirmation of processed documents that they sent to their local DTA office, etc.
- A benefits summary that includes monthly benefit amount, next benefit issue date, Electronic Benefit Transfer (EBT) balance, etc.,
- Alerts about their benefits, upcoming appointments and workshops, etc.

### **Other Public Benefits: Subsidized Housing**

For a beneficiary to have a better sense of how their housing will be impacted by work, it will be important for them to find out whether they live in housing subsidized by the state, or the federal Department of Housing and Urban Development (HUD).

To confirm which type of housing they reside in, it is best to start by contacting their Leasing Agent at their local housing authority and/or the site manager where they live. A good general rule of thumb though is if a person's lease or income verification has the words "federal public housing", "U.S. Department of Housing and Urban Development", or "HUD", they probably live in federally-funded housing. If they see words such as "state-assisted housing", "Department of Housing and Community Development," or "DHCD", they probably live in state-funded housing.

For a list of all the Public Housing Authorities in Massachusetts, visit [https://portal.hud.gov/hudportal/HUD?src=/program\\_offices/public\\_indian\\_housing/pha/contacts/ma](https://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/pha/contacts/ma).

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