



APPENDIX A



**Sample of One Kind of Documentation From a Third Party That
Can Be Sent To the Social Security Administration To Support an
Individual's Application for SSI/SSDI/DAC Benefits**

**Sample Letter To SSA Informing Them That You Are a
Student, Are Eligible for the Student Earned Income Exclusion,
and You Are Going To Work**

**Sample of One Kind of Documentation From a Third Party That Can Be Sent To
the Social Security Administration To Support an Individual's Application
for SSI/SSDI/DAC Benefits**

Developed by Marsha Katz, The Rural Institute

To: Social Security Administration

RE: _____

SSN: _____

From: _____

Relationship to the Person Above: _____

I have known _____ for _____ years/months and I have personally observed the following significant limitations in his/her ability to function:

- ___ not able to remember locations
- ___ not able to remember "work-like" procedures
- ___ not able to remember short, simple instructions
- ___ not able to remember detailed instructions
- ___ doesn't understand short, simple instructions
- ___ doesn't understand detailed or complex instructions
- ___ not able to carry out one- or two-step instructions without prompting/reminding/monitoring
- ___ not able to carry out detailed instructions
- ___ not able to concentrate for more than very short periods of time
- ___ not able to pay attention for more than a very short time
- ___ not able to follow a schedule, or not able to do so without considerable or continual support
- ___ not able to arrive on time without support
- ___ not able to maintain regular attendance without considerable or continual support
- ___ not able to follow/maintain a routine without support/assistance
- ___ not able to make simple decisions that are "work-like" in nature
- ___ is easily distracted
- ___ is difficult to refocus
- ___ not able to work for one day/shift without losing time because of psychological symptoms
- ___ not able to work at a consistent pace at all

- ___ not able to work at a consistent pace without numerous and/or lengthy rest periods
- ___ does not interact appropriately with people in the community
- ___ not able to accept criticism from supervisors
- ___ not able to accept instructions from supervisors
- ___ doesn't get along with co-workers and/or peers
- ___ can't work alongside others without distracting them
- ___ exhibits extremes in behavior in school or work sessions
- ___ doesn't maintain basic standards of neatness and cleanliness
- ___ not able to maintain basic cleanliness and neatness without regular prompting/
monitoring/reminding/supervision
- ___ doesn't ask for help when needed
- ___ doesn't deal well with change in daily routine or school or work settings
- ___ isn't able to act in a manner that keeps him/her safe from harm/unsafe conditions
- ___ doesn't recognize danger or hazardous situations/materials
- ___ can't travel to new places alone or without support/assistance from another person
- ___ not able to use public transportation without assistance or special arrangements
- ___ isn't able to set goals independently
- ___ isn't able to make his/her own plans without assistance or direction from others

If you have any questions about my observations, please don't hesitate to call me at

_____.

Sincerely,

(Name)

(Address)

**Sample Letter To SSA Informing Them That You Are a
Student, Are Eligible for the Student Earned Income Exclusion, and You Are
Going To Work**

Developed by Lynn Moses, The Rural Institute

Date _____

Dear Social Security Administration,

This letter is to inform you that _____ was recently hired for part-time, paid employment. _____ meets Social Security's definition of "student child" and is eligible for the Student Earned Income Exclusion. Please see the attached documentation of employment and student status. Please call _____ at _____ with any further questions.

Sincerely,

Name of Student: _____

Social Security Number: _____

Employer: _____

Job Title: _____

Start Date: _____

Wage: _____

Estimate of hours to be worked each month: _____

(Wage X hours/month will give approximate monthly earned income to be excluded)

Proof of Student Status (Student Child) *Circle all that apply:*

School ID card Letter from school verifying student status

Please contact school at the following address/phone number to verify student status: _____

Other: _____

Is the student currently attending school? Yes No

Is the student expected to attend school during the next quarter? Yes No

Expected date of graduation from school: _____

Important:

- ◆ Please send these forms to your local Social Security office or Supplemental Security Claims Representative.
- ◆ Please remember to send the student's pay stubs to Social Security so they can verify that the student has earned less than the exclusion amount.

Student Earned Income Exclusion Information

What is “Student Earned Income Exclusion”?

Children under the age of 22 who are regularly attending school and working can exclude earnings from their income.

What does "regularly attending school" mean?

"Regularly attending school" means that the person takes one or more courses of study and attends classes:

- in a college or university for at least 8 hours per week; or
- in grades 7 through 12 for at least 12 hours per week; or
- in a training course to prepare for employment for at least 12 hours per week (15 hours a week if the course involves shop practice); or
- for less time than indicated above for reasons beyond the student's control (such as illness).

A person who is homebound because of a disability may be a student when he or she studies a course or courses given by a school (grades 7-12), college, university, or government agency; and has a home visitor or tutor from school who directs the study or training. Home schooling may also count as school time.

For more information on the Student Earned Income Exclusion, please visit the following websites:

<http://www.ssa.gov/notices/supplemental-security-income/spotlights/spot-student-earned-income.htm>

“It Doesn’t Take a Rocket Scientist: To Understand & Use Social Security Work Incentives”:

http://ruralinstitute.umt.edu/training/publications/7th_edition_rocket.asp