

What to Submit with a Waiver?

If client on SSI (and income less than SSI rate + SSP rate + \$85) –

SSI Waiver Form (deemed defeat the purpose) – *complete pages 1-2 & 9*

SSI waiver letter (deemed defeat the purpose) – *fill in specifics for client's case*

Proof supporting no fault, if any (exempt funds, proof wages reported to SSA, etc.)

If client no longer on SSI (or on SSI and income greater than SSI rate + SSP rate + \$85) –

SSI Waiver Form (with finances) – *complete pages 1-9*

SSI waiver letter (with finances) – *fill in specifics for client's case*

Proof supporting no fault, if any (exempt funds, proof wages reported to SSA, etc.)

Waiver Expense Chart

Financial documentation for past 2 months (bank statements, proof of income, proof of documented expenses like rent, utilities, etc.)

If client on SSD (and answered “Yes” to Question #6 or #7 on Waiver Form) –

SSD Waiver Form (deemed defeat the purpose) – *complete pages 1-2 & 9*

SSD waiver letter (deemed defeat the purpose) – *fill in specifics for client's case*

Proof supporting no fault, if any (exempt funds, proof wages reported to SSA, etc.)

Proof that client or dependent household member receives SSI, TANF, or VA disability pension

If client on SSD (and no SSI, TANF, VA for client or any dependent household member) –

SSD Waiver Form (with finances) – *complete pages 1-9*

SSD waiver letter (with finances) – *fill in specifics for client's case*

Proof supporting no fault, if any (exempt funds, proof wages reported to SSA, etc.)

Waiver Expense Chart

Financial documentation for past 2 months (bank statements, proof of income, proof of documented expenses like rent, utilities, etc.)

Fax everything to the local SSA office and keep a copy plus the fax receipt. Call SSA in 3 weeks to confirm receipt of waiver, entry into computer system, and recoupment stopped pending decision.

Local SSA addresses and fax numbers by zip code: www.ssa.gov/locator

Local phone #: <https://www.ssa.gov/open/data/FO-RS-Address-Open-Close-Time-App-Devs.html>

DO NOT SUBMIT THIS PAGE WITH THE WAIVER FORM