**What to Submit with a Waiver Form?**

**If client or any household member currently gets needs-based assistance benefits –**

Waiver Form – *complete pages 1-2 & page 9*

SSA waiver letter – *fill in specifics for client’s case*

Proof supporting no fault, if any (exempt funds, proof of wage reporting to SSA, etc.)

Proof of receipt of needs-based assistance benefits. *See* POMS GN 02250.110 for proof.

**If client is not on SSI and no household member gets needs-based assistance benefits –**

Waiver Form – *complete pages 1-9*

SSA waiver letter – *fill in specifics for client’s case*

Proof supporting no fault, if any (exempt funds, proof of wage reporting to SSA, etc.)

Waiver Expense Chart – *to list more expenses than there is room for on page 7*

NOTE: SSA does not require proof of expenses.

Proof of household income and resources no older than 3 months from the waiver date.

*See* POMS GN 02250.255 for types of proof.

Fax waiver and proof to the local SSA office and keep fax receipt: https://secure.ssa.gov/ICON/main.jsp

Call SSA in 3 weeks to confirm receipt of waiver and stop recoupment pending decision:

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

**NOTE:** Needs-based assistance programs include: Supplemental Security Income (SSI); Temporary Assistance for Needy Families (TANF); Veterans Affairs (VA) service and non-service-related disability pension based on need; Supplemental Nutrition Assistance Program (SNAP); or Medicare Part D Extra Help Program (Low-Income Subsidy). This also applies if the individual’s**and** household members’ income is at or below 150% of the federal poverty level (FPL) and resources are within the limit for defeats the purpose (below $6,000 for an individual or $10,000 for an individual with a spouse or one dependent; plus $1200 for each additional dependent). POMS GN 02250.110; GN 02250.100.