

Agency Process: Contacting Social Security Administration (SSA)

The majority of Social Security discrepancies can be resolved utilizing system data exchanges. However, there are times when SOLQ-I is unclear. Some situations that might require further research beyond system data exchanges include, but are not limited to:

- Gross/Net Social Security income discrepancies
- CMWA Alerts, such as:
 - 635: VERIFY INDIVIDUAL INCOME TYPE SSRE OR SSDI
 - 636: CONTACT SSA TO VERIFY THE DEFERRED PAYMENT AMOUNT
- Special Status Medicaid Determinations (503, DAC, Widow/Widower)

DHS recommends agencies contact SSA directly when such situations arise. Over the years, we've found that contacting SSA directly is not always practical or efficient (ex. SSA's long hold times, refusal by SSA to communicate without ROI, incomplete responses, reliable contacts retiring, etc.).

As of 3/31/2025, Capital Consortium will follow the process below when attempting to gather more information regarding Social Security benefits if data exchanges lack the information to resolve the matter:

1. Request information from the client, adding clarifying text to the VCL as necessary.
 - a. Example VCL text: *The agency is unable to determine how much Social Security income to count toward your benefit determination. Please provide the agency with a copy of your most recent award letter. Please call the agency if you need assistance.*
 - b. If on the phone with the client, ask clarifying questions and assist with ways to obtain verification (Recent award letters mailed? Online access to SSA to retrieve award letter?)
2. If the client reports difficulty or an inability to obtaining verification:
 - a. Email PRT, hseaprobes@danecounty.gov, and include the following in the email:
 - i. Subject: "Request to contact SSA"
 - ii. Body: Client Case/Name/DOB/SSN, with brief description of the information needed
 - b. PRT will email the request for information to SSA, WI.FO.Madison@ssa.gov.
 - i. **This email contact is to be used by PRT only.**
3. If unable to get clarity from the client and SSA fails to respond, staff will use "best information available" policies outlined in the appropriate benefit handbook.
 - a. MEH 20.5, BCPH 9.8, FSHB 1.2.1.3

Staff should not contact SSA on their own. SSA is difficult to reach, especially through general phone. This process allows staff to be efficient and move to their next call/item without delay.