



# Disability Income

Application Process and Required Forms

Presentation developed with the input and support of the  
DCA Statewide Medical-Legal Partnership Network



Neighborhood Legal Services  
of Los Angeles County



# Goal of this presentation is to be able to ...

- Identify common types of disability income and when they apply to people with cognitive impairment/dementia
  - Social Security Disability Insurance (SSDI)
  - Supplemental Security Income (SSI)
  - State Disability Insurance (SDI)
  - Cash Assistance Program for Immigrants (CAPI)
- Understand how to prepare medical forms requisite for State Disability Insurance benefits
- Identify resources where you and your patient can get assistance with applying for these benefits

# Overview of State and Federal Programs

State Programs	Federal Programs
State Disability Insurance (SDI)	Social Security Disability Insurance (SSDI)
Cash Assistance Program for Immigrants (CAPI)	Supplemental Security Income (SSI)

# Scenario 1 - Social Security Disability Insurance (SSDI)

Alex is a 60-year-old who worked as an office administrator for 42 years. Alex is a U.S. Citizen and is married. Alex recently stopped working due to a dementia diagnosis.

Is Alex eligible for SSDI? Why or why not?

# Social Security Disability Insurance (SSDI)

- Federal Program Administered by the Social Security Administration
- Be *disabled* as defined by the Social Security Administration;
- Must reside in the United States;
- Must have lawful presence in the United States (be a citizen, permanent resident, or “qualified alien” pursuant to section 431(b) of the Personal Responsibility Act);  
and
- Must have sufficient work credits: 40 credits, 20 of which were earned in the last 10 years ending with the year the disability begins.

# Is Alex eligible for SSDI?

- Alex is a 60-year-old who worked as an office administrator for 42 years. Alex is a U.S. Citizen and is married. Alex recently stopped working due to a dementia diagnosis.

LIKELY YES, presuming Alex has sufficient work credits. (Alex can verify with Social Security Administration.)

## Scenario 2 – Supplemental Security Income (SSI)

Alex is a 60-year-old who worked as an office administrator for 42 years. Alex is a U.S. Citizen and is married. Alex recently stopped working due to a dementia diagnosis.

Is Alex eligible for SSI? Why or why not?



# Supplemental Security Income (SSI)

- Federal Program Administered by the Social Security Administration
- Be aged 65+, be blind, or be disabled as defined by the Social Security Administration;
- Must reside in the United States;
- Must have lawful presence in the United States (be a citizen, permanent resident, or “qualified alien” pursuant to section 431(b) of the Personal Responsibility Act)\*; and
- Be low-income and low resourced (\$2,000 or less in assets for individual or \$3,000 for a couple).
- The monthly maximum Federal benefit is \$943 for an individual, which is supplemented by CA for a **MAXIMUM total benefit of \$1,182.94** in 2024.<sup>1</sup>

Supplemental Security Income (SSI) in California 2024, <https://www.ssa.gov/pubs/EN-05-11125.pdf>

# Supplemental Security Income (SSI) for Noncitizens

- Lawfully admitted for permanent residence.
- Granted conditional entry.
- Paroled into the United States.
- Admitted as a refugee.
- Granted asylum.
- An alien whose removal is being withheld.
- A Cuban or Haitian Entrant.
- Admitted as an Amerasian Immigrant.
- Admitted as an Afghan or Iraqi Special Immigrant.
- Admitted as an Afghan humanitarian parolee or Afghan Non-Special Immigrant Parolee.
- Admitted as a Ukrainian humanitarian parolee.

**SEVEN YEAR LIMITATION FOR SOME NONCITIZENS  
ADDITIONAL REQUIREMENTS APPLY**

# Is Alex eligible for SSI?

- Alex is a 60-year-old who worked as an office administrator for 42 years. Alex is a U.S. Citizen and is married. Alex recently stopped working due to a dementia diagnosis.

LIKELY YES, presuming Alex and spouse have less than \$3,000 in assets (excluding their place of residence and 1 vehicle/per person).

## Scenario 3 - State Disability Insurance (SDI)

Alex is a 60-year-old who worked as an office administrator for 42 years. Alex is a U.S. Citizen and is married. Alex recently stopped working due to a dementia diagnosis.

Is Alex eligible for SDI? Why or why not?

# State Disability Insurance (SDI)

- State Program Administered by the California Employment Development Department
- Must apply no earlier than 9 days after the first day of disability onset but no later than 49 days after\*\*\*;
- Be unable to do regular or customary work for at least 8 days;
- Lose wages because of the disability; and
- Earned at least \$300 from which SDI deductions were withheld during base period.
- **BENEFITS** = up to 52 weeks of benefits (depending on physician certification and available wages from base period)

# Is Alex eligible for SDI?

- Alex is a 60-year-old who worked as an office administrator for 42 years. Alex is a U.S. Citizen and is married. Alex recently stopped working due to a dementia diagnosis.

LIKELY YES, presuming Alex applied within 49 days of diagnosis and paid taxes in California.

# Which program should a provider recommend?

- Alex should consider applying for **BOTH** state and federal benefits.
- If Alex was diagnosed in the last 49 days, a provider should encourage Alex to first apply for SDI to exhaust those benefits (which can provide financial stability while Alex prepares a Social Security application and awaits a decision).
- Alex cannot receive SDI contemporaneously with SSDI or SSI.
- Although Alex appears eligible for both Social Security programs, one may have a greater benefit award. Therefore, encourage Alex to apply to both SSDI and SSI.

## Scenario 4 – Review of SSDI, SSI, and SDI

- Clarissa was a famous child actor who abruptly stopped working to try to resume a normal life. Clarissa ultimately went to University to become an Elementary School Teacher and began teaching 3rd grade. Unfortunately, she struggled living under the pressure of constant paparazzi and bad press, which not only caused her severe depression and anxiety, but also meant Clarissa no longer makes any residual income from her childhood movies. Her mental health has taken a rapid decline shortly after starting work and she has been diagnosed with an extremely rare case of early onset dementia at age 32. Clarissa had to stop working as a teacher after one academic year, and she has now depleted her bank account down to \$50,000. Clarissa lives alone.

Is Clarissa eligible for SSDI, SSI, SDI or all three? What is the process/ what forms would she need?



# Which Program(s) is Clarissa Eligible for?

SSDI	SSI	SDI
Social Security Disability Insurance	Supplemental Security Income	State Disability Insurance
NO	NO	YES
Lacks sufficient work credits (from the decade of diagnosis)	Over-asset (because of \$50,000 savings)	Recently diagnosed and presumably paid SDI taxes while teaching

# Applying for Social Security (SSDI and SSI)

- **PATIENT** submits SSA-16 (Application for Social Security Disability Insurance Benefits)  
Includes proof of identify, citizenship/legal permanent residence status, employment and earnings verification, household information, workers' compensation benefits, etc.
- **PATIENT** submits Form SSA-827 (Authorization to Disclose Information to the Social Security Administration (SSA))
- **PATIENT** submits SSA-3368-BK (Disability Report – Adult), depending on adequacy of provided medical records. Patients are encouraged to complete form with their providers to ensure accuracy of medical conditions and treatments.

# Applying for State Disability Insurance (SDI) – Form DE 2501

- **PATIENT** submits “Part A – Claimant's Statement” on Form DE 2501 Claim for Disability Insurance (DI) Benefits
- **PROVIDER** submits “Part B – Physician/Practitioner's Certificate” on Form DE 2501 Claim for Disability Insurance (DI) Benefits
- **SAMPLE** DE 2501 is available on EDD website:  
[https://edd.ca.gov/siteassets/files/pdf\\_pub\\_ctr/de2501.pdf](https://edd.ca.gov/siteassets/files/pdf_pub_ctr/de2501.pdf)

# Applying for State Disability Insurance – Form DE 2501

- Demographic information about your patient, about your license, and your practice:

B6. PHYSICIAN/PRACTITIONER'S LICENSE NUMBER										B7. STATE OR COUNTRY (IF NOT U.S.A.) THAT ISSUED LICENSE NUMBER ENTERED IN B6											
LICENSE NUMBER										STATE		C A		COUNTRY		USA					
B8. PHYSICIAN/PRACTITIONER LICENSE TYPE										B9. SPECIALTY (IF ANY)											
M D																					
B10. PHYSICIAN/PRACTITIONER'S NAME AS SHOWN ON LICENSE																					
(FIRST)					(MI)		(LAST)			SUFFIX											
SAMPLE PHYSICIAN							SAMPLE PHYSICIAN														
B11. PHYSICIAN/PRACTITIONER'S ADDRESS																					
MAILING ADDRESS, PO BOX OR NUMBER/STREET/SUITE#																					
PHYSICIAN'S MAILING ADDRESS																					
CITY					STATE		ZIP OR POSTAL CODE			COUNTRY (IF NOT U.S.A.)											
PHYSICIAN'S MAILING ADDRESS CONTINUED																					
COUNTY HOSPITAL/GOVERNMENT FACILITY ADDRESS																					
FACILITY NAME (IF APPLICABLE)																					
PHYSICIAN'S FACILITY NAME																					
FACILITY ADDRESS, NUMBER/STREET/SUITE#																					
PHYSICIAN'S FACILITY ADDRESS																					
CITY					STATE		ZIP OR POSTAL CODE			COUNTRY (IF NOT U.S.A.)											
PHYSICIAN'S FACILITY ADDRESS CONTINUED																					

# Applying for State Disability Insurance – Form DE 2501

B19. ICD DIAGNOSIS CODE(S) FOR DISABLING CONDITION THAT PREVENT THE PATIENT FROM PERFORMING HIS/HER REGULAR OR CUSTOMARY WORK (REQUIRED)

PRIMARY  SECONDARY

(Check only one box)

EXAMPLE OF HOW TO COMPLETE ICD CODES

ICD-9  ICD-9

ICD-10  ICD-10

ICD CODES FOR DIAGNOSIS. FOR EXAMPLE: DEMENTIA

PRIMARY  SECONDARY

B20. DIAGNOSIS (REQUIRED) - IF NO DIAGNOSIS HAS BEEN DETERMINED, ENTER A DETAILED STATEMENT OF SYMPTOMS

INFORMATION ON DIAGNOSIS. FOR EXAMPLE:

DEMENTIA, ALZHEIMER'S DISEASE, VASCULAR DEMENTIA, ETC.

B21. FINDINGS - STATE NATURE, SEVERITY, AND EXTENT OF THE INCAPACITATING DISEASE OR INJURY, INCLUDE ANY OTHER DISABLING CONDITIONS

INFORMATION ON SEVERITY OF DIAGNOSIS. FOR EXAMPLE:

LOSS OF BODILY FUNCTION, DIFFICULTY PROCESSING INFORMATION, LOSS OF COGNITIVE FUNCTION, ETC.

B22. TYPE OF TREATMENT/MEDICATION RENDERED TO PATIENT

INFORMATION ON TREATMENT / MEDICATION

B23. IF PATIENT WAS HOSPITALIZED, PROVIDE DATES OF ENTRY AND DISCHARGE

CHECK HERE TO INDICATE THE PATIENT IS STILL HOSPITALIZED

MMDDYYYY TO MMDDYYYY

- Information about hospitalizations and ICD procedure codes, if any;
- Information about other medical treatment, if any; and
- Information about drug or alcohol recovery treatment, if any.

# Cash Assistance Program for Immigrants (CAPI)

- State Program Administered by the California Department of Public Social Services
- Must reside in California;
- Must qualify for Supplemental Security Income benefits *BUT FOR* immigration status;  
and
- Must not be a fleeing felon/parole violator.

## Scenario 5 – Review of SSDI, SSI, SDI, and CAPI

- Ari is a 70-year-old who was recently approved as an asylee in the United States and also diagnosed with dementia by his provider (through full-scope Medi-Cal insurance). Ari cannot work, and Ari has no lawful work history in the United States.
- What disability benefit(s) should Ari apply for?

# Which Program(s) is Ari Eligible for?

SSDI	SSI	SDI	CAPI
Social Security Disability Insurance	Supplemental Security Income	State Disability Insurance	Cash Assistance Program for Immigrants
NO	NO	NO	YES
Lacks sufficient work credits (due to immigration status)	Lacks sufficient work credits (due to immigration status)	Lacks sufficient work credits (due to immigration status)	Ari should contact Department of Public Social Services to apply.



# Links to Application Forms

- Supplemental Security Income: <https://secure.ssa.gov/iClaim/dib>
- Social Security Disability Insurance Benefits: <https://secure.ssa.gov/iClaim/dib>
- State Disability Insurance Benefits: [https://edd.ca.gov/sdi\\_online](https://edd.ca.gov/sdi_online)\*  
\* Providers can fill out the DE 2501 online if their patients provide their verification number.
- Cash Assistance Program for Immigrants: <https://dpss.lacounty.gov/en/cash/capi.html>

# Resources to Apply for SSDI/SSI Benefits

- Social Security Work Credit Statement: <https://www.ssa.gov/myaccount/statement.html>
- SSI for Noncitizens: <https://www.ssa.gov/pubs/EN-05-11051.pdf>
- Disability Application Checklist: <https://www.ssa.gov/hlp/radr/10/ovw001-checklist.pdf>

# Resources to Apply for SDI Benefits

- Undocumented Workers' Guide to Applying for California Disability Insurance:  
<https://legalaidthatwork.org/guides/undocumented-workers-guide-to-applying-for-california-disability-insurance-paid-family-leave/>
- EDD Certify and Manage Claims – Basics for Licensed Health Professionals:  
[https://edd.ca.gov/en/disability/Basics\\_for\\_Physicians-Practitioners/](https://edd.ca.gov/en/disability/Basics_for_Physicians-Practitioners/)

# Where to go for assistance?

SSI/SSDI: Local Social Security Administration office  
Disability Determination Services (DDSs)

SDI: Local Employment Development Department office

CAPI: Local Department of Public Social Services office

If available, reach out to Social Workers or Community Health Workers at your site

# How to Claim Continuing Medical Education (CME) Credit?

Please scan the QR code on this slide to claim credit.

- Use your phone camera to scan the QR code and tap the notification to open the link associated with the CME portal.
- Enter your first name, last name, profession, and claim **1 CE credit** for the webinar.



# Thank You

For more information please contact:

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