

## **Social Security Updates**

### **An Improved Disability and Work History Report**

If you are involved in helping others apply for Social Security disability benefits, here is some news you can use. As of January 23, 2010, all new disability applications will be made through an enhanced version of the Internet Adult Disability Report. This will replace the Adult Disability Report–PRO for new applications only.

The transition to the enhanced application should not be difficult for those who have previously used the PRO. Please note that you can continue to use the existing Adult Disability Report-PRO version for any disability report you have already started but not yet completed. Anyone attempting to access the Adult Disability Report-PRO to begin a new application after January 23 will be automatically redirected to the enhanced version. The web address for the new report will be [www.socialsecurity.gov/disabilityreport](http://www.socialsecurity.gov/disabilityreport).

### **Tax Tips from Social Security**

Here are a few tax tips we suggest you share with your clients who receive benefits.



Make sure all dependents listed on a taxpayer's annual tax forms have Social Security numbers. Check the names and numbers to make sure they match up. The Internal Revenue Service (IRS) checks all the names and Social Security numbers on tax returns against Social Security's records. If the names and numbers do not match Social Security's records, it could mean a long delay in receiving any tax refund due.

If your client needs to pay taxes on benefits, he will need his SSA-1099 for Tax Year 2009. The 1099 shows the total amount of benefits received in the previous year. The forms were automatically mailed to all beneficiaries by January 31, 2010. Anyone who has not yet received a Form SSA-1099 for 2009 can request a replacement online at [www.socialsecurity.gov/onlineservices](http://www.socialsecurity.gov/onlineservices).

## A Few Words About Medicare Part B



If you have clients covered under Medicare Part A who originally opted not to apply for Medicare Part B, but who now wish to do so, now's the time to enroll in Part B. The general enrollment period runs from January 1 through March 31.

Each year, the Medicare general enrollment period runs January 1 through March 31. Coverage begins the following July. But keep in mind that, for most people, the monthly premium increases 10 percent for each 12-month period a person was eligible for, but did not enroll in, Medicare Part B.

Learn more about Medicare by reading our publication on the subject at [www.socialsecurity.gov/pubs/10043.html](http://www.socialsecurity.gov/pubs/10043.html).

Here's news for the small percentage of high income people who already have Medicare Part B and are currently paying a higher than normal premium because of their income: if someone has experienced a significant reduction in overall income, Social Security might be able to reduce the amount of the Medicare Part B premium. The significant reduction in income can be due to any of a number of changes: marriage, divorce or annulment, death of a spouse, work reduction, work stoppage, reduction of income due to a loss of income-producing property, and loss or reduction of certain forms of pension income. Find out more about adjusting Medicare Part B premiums due to a significant reduction in income at [www.socialsecurity.gov/mediinfo.htm](http://www.socialsecurity.gov/mediinfo.htm).

## New Data Available Online

In support of President Obama's *Transparency and Open Government* initiative, Social Security data is now available at [www.data.gov](http://www.data.gov).



"I applaud President Obama's commitment to creating an unprecedented level of openness in government and the new datasets we are posting far exceed what was asked of us," said Commissioner Astrue. "Social Security has always valued transparency and sought to give the public user-friendly information about our programs."

To learn more, visit [www.socialsecurity.gov/pressoffice/pr/dataset-pr.htm](http://www.socialsecurity.gov/pressoffice/pr/dataset-pr.htm)