



ALCOHOL, DRUG & MENTAL HEALTH SERVICES
MARYE L. THOMAS, M.D., DIRECTOR

Alameda County Substitute Payee Program
P. O. Box 129, San Leandro, CA 94577
(510) 383-1567 FAX (510) 383-1583
QIC 28005

Date: March 6, 2003

To: All Sub-Payee Case Managers and Contact Staff

RE: Client Balance Over \$2,000.00

REMINDER:

SSI recipients are ineligible for SSI benefits if their resources exceed \$2,000.00

When your client's balance in their Substitute Payee Trust Account is over \$2,000.00 on the first day of the month, this constitutes an overpayment. Social Security regulations stipulate that we must return the SSI payment received for each month the balance is over \$2,000.00.

If the balance in any other account, plus the balance in the Substitute Payee Trust Account exceeds \$2,000.00 on the first day of the month, this also constitutes an overpayment. We must return the SSI payment received to Social Security for each month the combined balances exceed \$2,000.00.

If a client receives a retroactive SSI and/or SSA payment and it exceeds \$2,000.00, they will have six months from the date the payment is received to spend it down to or below \$2,000.00 in order to remain eligible for SSI.

If you have any questions regarding these regulations, you can reach me at (510) 383-1567, or at tie line 31567.



A Department of Alameda County Health Care Service Agency