



CENTER FOR
DEVELOPMENT
& DISABILITY

SOCIAL SECURITY TRAINING SERIES

It's Never Too Late To Start!

Presented by
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Partners for Employment

Presenters:



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Education Specialist



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**What comes to your mind
when you hear the term
SOCIAL SECURITY?**

Presentation Outline



1. Social Security Overview
2. What's in the Social Security Training Series?
 - Who are these trainings for?
 - Why Micro-training?
 - Micro-training topics and summaries.
3. Accessing the Training
4. Tip Sheets
5. Benefits Advisors in New Mexico





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Part One: Social Security Overview

What is Social Security?



- Social Security provides financial protection for our nation's people, supporting Americans throughout all of life's journeys.
- The Social Security system consists of three major components: retirement benefits, survivors' benefits, and disability insurance.
- In 1957, Social Security benefits were first provided to disabled workers.
- Social Security Benefits have two programs that support individuals with disabilities: Social Security disability insurance (SSDI) & Supplemental Security Income (SSI).



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Part Two: **What's in the Social Security Training Series?**

Who Are These Trainings For?

Individuals with disabilities and their families



School Districts & Regional Cooperatives



Supported Employment Agencies



Employers & HR Professionals



and any one else interested in Social Security Benefits!



Why Micro-Trainings?

- **Adaptability!**
- Your time is valuable and often limited. Micro trainings (trainings that last no longer than 15 minutes) allow you and those you work with the flexibility to train the way that suits you best.
- You can choose to view all the micro trainings in one sitting (approximately 60 minutes in length) or choose to watch specific trainings that interest you at any time and in any order.



Social Security Training Video Topics

**Part One:
General
Knowledge about
Social Security**

**Part Two:
Dispelling Myths
about Social
Security Benefits**

**Part Three:
Case Study -
Social Security
Disability
Insurance Work
Incentives**

**Part Four:
Case Study -
Supplemental
Security Income
Work Incentives**

**Part Five:
How to Get
Personal Social
Security
Advisement**

Brief Social Security Video Summaries

Part One: General Knowledge about Social Security

Video Length:
13 Minutes & 19 Seconds

Video Overview: We give a brief history of Social Security in America. We define Disability, Social Security Disability Insurance, Supplemental Security Income, and explain the healthcare coverage included with these programs.



Brief Social Security Video Summaries

**Part Two:
Dispelling Myths
about Social
Security Benefits**

**Video Length:
8 Minutes & 53 Seconds**

Video Overview: We discuss common myths and facts related to working and receiving Social Security Benefits.

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Dispelling Myths about Social Security Benefits

Dispelling Myths

Fact #2

There are many factors that affect your benefits:

- Your living arrangements.
- Your employment situation.
- Your family income, especially if you are under 18.
- If you are over 18 and your benefits provide for a family or spouse.



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Brief Social Security Video Summaries

Part Three: Case Study - Social Security Disability Insurance Work Incentives

Video Length:
14 Minutes & 31 Seconds


Video Overview: We explore the role of SSDI work incentives in the fictional life of a young adult with Down Syndrome.



The graphic features a yellow square background with a magnifying glass over a laptop screen, a pie chart, and a bar chart, symbolizing research and data analysis.

Social Security Training Series

Part 3: Case Study - Social Security Disability Insurance (SSDI) Work Incentives



A circular portrait of a young man with short brown hair and glasses, wearing a grey hoodie.

MEET DAVID

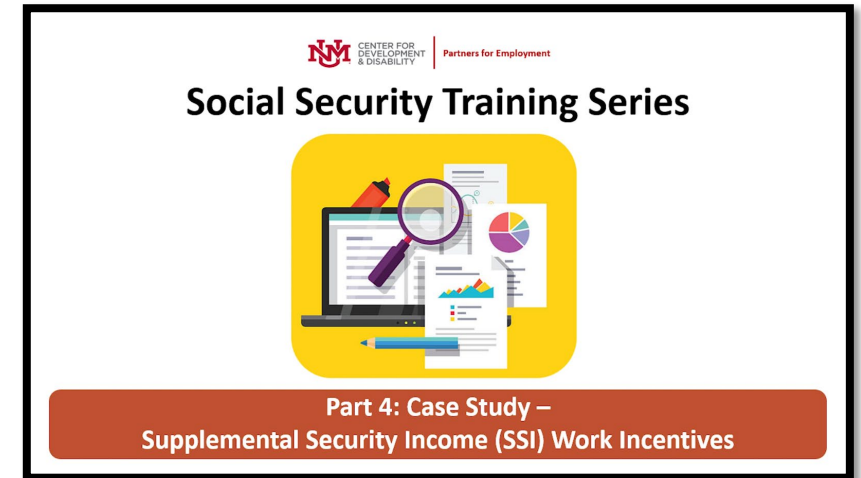
- From Socorro, New Mexico.
- Born with Down Syndrome.
- Completed high school on a modified pathway.
- Participated in community-based work experiences.
- Now receives DVR services.
- Receives Social Security Disability Insurance (SSDI) benefits, including Medicare.


Brief Social Security Video Summaries


Part Four: Case Study - Supplemental Security Income Work Incentives


Video Length:
12 Minutes & 40 Seconds


Video Overview: We explore the role of SSI work incentives in the fictional life of a full-time student with Autism.




 Jenny is working 16 hours a week at \$12 per hour.

 HOW CAN JENNY WORK AND KEEP HER SUPPLEMENTAL SECURITY INCOME?

 **STUDENT EARNED INCOME EXCLUSION (SEIE).**

 This Work Incentive allows a person who is under the age of 22 and **regularly attending school** to exclude earnings from their income.



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Brief Social Security Video Summaries

Part Five: How to Get Personal Social Security Advisement

Video Length:
10 Minutes & 48 Seconds

Video Overview: We demonstrate how to create a my Social Security Account, review benefits advisors in New Mexico, and discuss document organization.

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Social Security Training Series

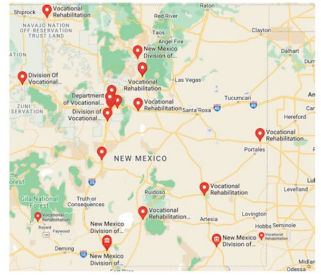


Part 5: How to Get Personal Social Security Advisement


Meeting with Your Local Benefits Advisor

Your local DVR office can help you understand some aspects of your benefits and put you in touch with a dedicated **Benefits Advisor**.

There are **over 20 DVR offices** established across the state of New Mexico. We encourage you to contact your local DVR Office today.



****To view the state directory of DVR offices please visit dvr.state.nm.us/locations/.**

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Part Three: Accessing the Trainings

How to Register for the Trainings

Visit the PFE Website
(cdd.unm.edu → Other Disability Programs → Partners for Employment)

Click on Training & Technical Assistance

Select Social Security Benefits and Employment

Register for the Training on Learning Stream

Trainings & Technical Assistance

Join free training opportunities on a variety of employment topics.

Social Security Benefits and Employment

This course provides an overview of the differences between Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI). It also explains how work incentives and safety nets can benefit people who are employed.

5 videos total, 9-15 minutes each.

[Register here](#) to watch the videos. A Learning Stream Account is required to access the videos and skill check and to receive a certificate of completion.

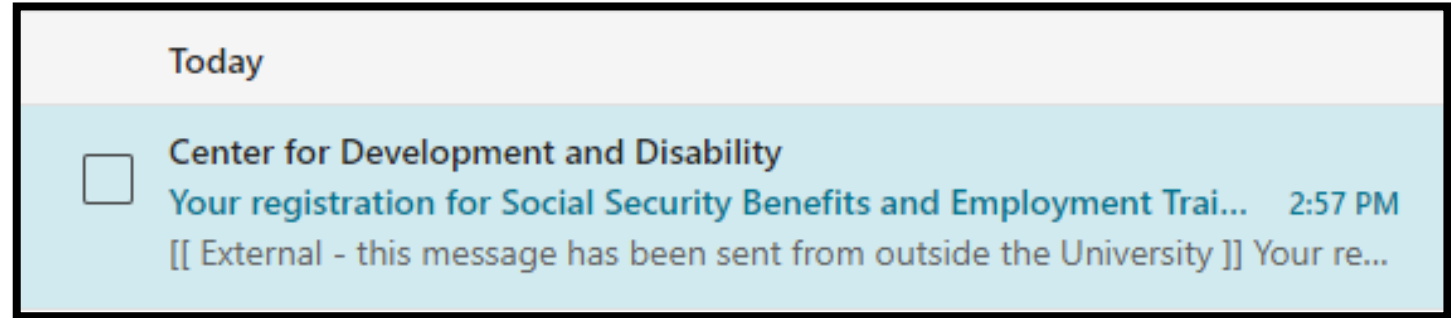
*You will need to have a learning stream account to access the trainings.

After You've Registered

Once you've registered, you will receive a confirmation email.

In this email, you will receive:

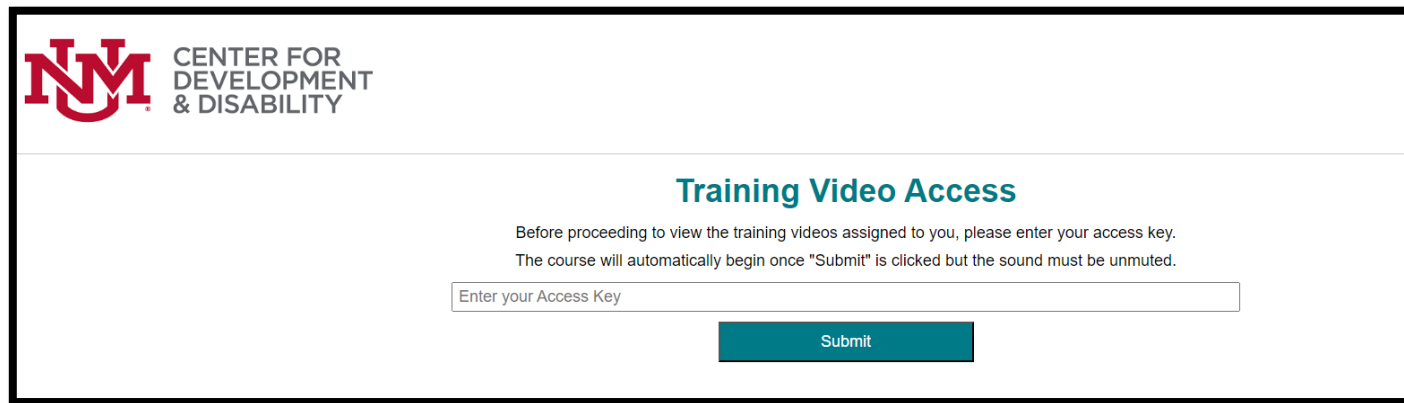
1. A copy of your registration form.
2. Your unique link to the five Social Security Training videos **and Access Key.**
3. Resources that accompany each of the videos.
4. Important instructions on how to complete the training and receive your one hour of continuing education credit. **(Please read these first.)**




Tip: **Save your confirmation email** with all this information so you can have easy access to these trainings anytime!

Accessing the Trainings

1. Click “View the Event/Course”, which will take you to the event page. You will need to enter your **Access Key** to be able to view the 5 videos.

A screenshot of a web page titled "Training Video Access" from the Center for Development & Disability at NM. The page features a header with the NM logo and the center's name. Below the header, the title "Training Video Access" is displayed in blue. A message instructs users to enter their access key before proceeding to view training videos. Below this message is a text input field with the placeholder text "Enter your Access Key" and a teal "Submit" button.

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Training Video Access

Before proceeding to view the training videos assigned to you, please enter your access key.
The course will automatically begin once "Submit" is clicked but the sound must be unmuted.

Submit

Accessing the Trainings

2. The videos are set to be viewed in sequence.

The videos are marked as “Locked” and you will be unable to view the next video until you have watched the previous video.



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PFE Social Security Benefits Training 2024

[Refresh Content](#)
Video(s) must be watched in sequence
Refresh content to unlock next video(s) after viewing

Options	Media Name	Run Time
View Now	1. Part 1: General Knowledge about Social Security - Common Terms and Definitions	13:19
Locked	2. Part 2: Dispelling Myths about Social Security Benefits	8:53
Locked	3. Part 3- SSDI Work Incentives Case Study	14:31
Locked	4. Part 4 -SSI Work Incentives Case Study	12:4
Locked	5. Part 5 - Personal SS Advisement	10:48



Accessing the Trainings

3. You will notice when the next video is available when the marker displays “View Now”.

Note: If you do not close the video window, the videos will play automatically in sequence.



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PFE Social Security Benefits Training 2024

[Refresh Content](#)
Video(s) must be watched in sequence
Refresh content to unlock next video(s) after viewing

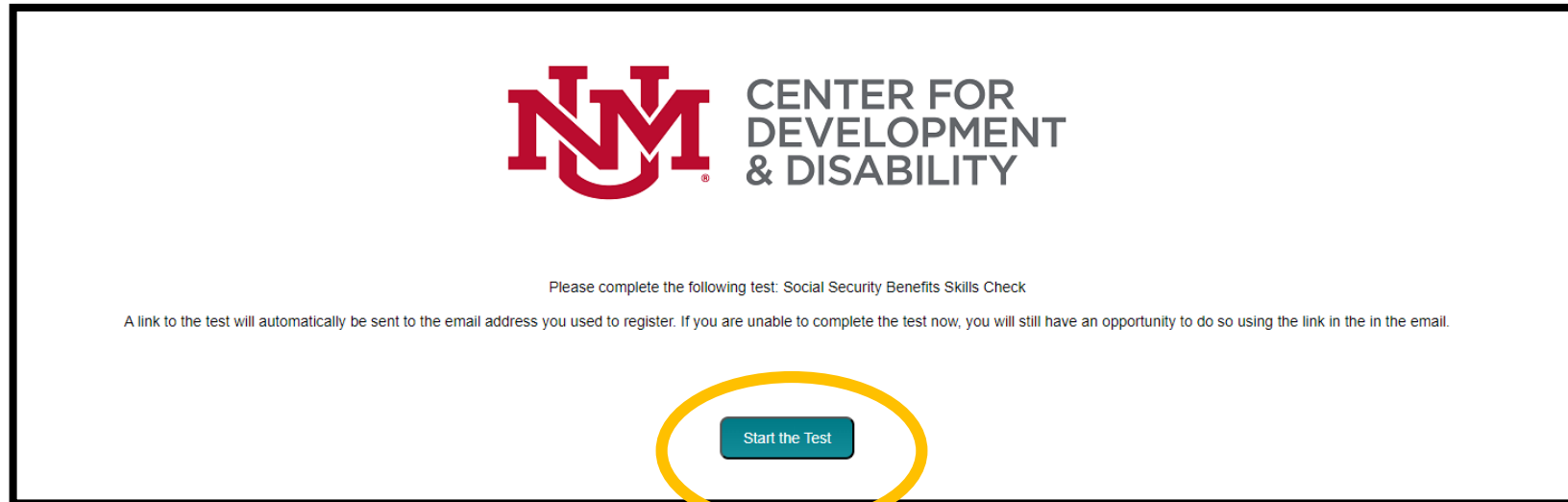
Options	Media Name	Run Time
View Now	1. Part 1: General Knowledge about Social Security - Common Terms and Definitions	13:19
View Now	2. Part 2: Dispelling Myths about Social Security Benefits	8:53
View Now	3. Part 3- SSDI Work Incentives Case Study	14:31
View Now	4. Part 4 -SSI Work Incentives Case Study	12:4
View Now	5. Part 5 - Personal SS Advisement	10:48



Accessing the Trainings

4. Once you have viewed all 5 videos, the skills check email will be sent to you within 30 minutes. You can click “Begin Test” and be directed to the skills check page.

Note: A score of 80% or higher must be obtained for a passing score. You will be given 5 attempts to earn a passing score.



Accessing the Trainings

5. After passing the skills check, you will receive the *Certificate of Completion* email. You can download your certificate as a PDF with one Learning Hour.

Note: If you have not received your *Certificate of Completion* within 3 business days of receiving a passing score, please contact cdd-pfeinfo@salud.unm.edu.





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Part Four: Social Security Tip Sheets

Social Security Tip Sheets

Tip Sheets

- 1619(b) Supplemental Security Income (SSI) Work Incentive Tip Sheet
- Student Earned Income Exclusion (SEIE) Tip Sheet
- Ticket to Work Tip Sheet
- Supplemental Security Income (SSI) Tip Sheet
- Supplemental Security Income (SSI) Tip Sheet Spanish ★
- Social Security Disability Insurance (SSDI) Tip Sheet
- Social Security Disability Insurance (SSDI) Tip Sheet Spanish ★
- Social Security Benefits - Frequently Asked Questions (FAQs)
- Social Security Benefits - Frequently Asked Questions (FAQs) Spanish ★
- ABE Accounts and Social Security Tip Sheet →
- ABE Accounts and Social Security Tip Sheet Spanish ★
- Age 18 Redetermination for SSI Tip Sheet
- Age 18 Redetermination for SSI Tip Sheet Spanish ★
- Social Security Timelines Tip Sheet
- Social Security Timelines Tip Sheet Spanish ★



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ABLE Account and Social Security

What is an ABE Account?

Achieving a Better Life Experience (ABLE) accounts are a type of financial account for individuals with disabilities that occurred before age 26. This account lets individuals save and purchase qualified items. Examples of these qualified items include: living expenses, education, housing, transportation, employment training and support, assistive technology, personal support services, health prevention and wellness, financial management, administrative services, legal fees, oversight and monitoring, funeral and burial.

As of 2024, an individual can save up to \$18,000 per year in their ABLE account.

If an individual is employed, as of 2024, they can save up to \$14,580 per year in their ABLE account.

The account's growth is tax-free and their contributions may be tax-deductible.

How do ABE Accounts impact Social Security?

Individuals with ABLE accounts who are receiving Supplemental Security Income (SSI) or Medicaid/CentennialCare can save up to \$100,000 without affecting their benefits. If the account has funds over \$100,000 (for example \$100,045), the account must be reduced to \$100,000 or below.



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Cuentas ABE y el Seguro Social

¿Qué es una cuenta ABE?

Las cuentas para lograr una mejor experiencia de vida (Achieving a Better Life Experience, ABE) son un tipo de cuenta financiera para personas con discapacidades que hayan sucedido antes de los 26 años. Este tipo de cuenta permite a las personas ahorrar y comprar artículos calificados. Ejemplos de estos elementos calificados incluyen: gastos de manutención, educación, vivienda, transporte, capacitación y apoyo laboral, tecnología de asistencia, servicios de apoyo personal, prevención de salud y bienestar, gestión financiera, servicios administrativos, honorarios legales, supervisión y seguimiento, funeral y entierro.

A partir del 2024, una persona puede ahorrar hasta \$18,000 por año en su cuenta ABE.

Si una persona está empleada, a partir del 2024, puede ahorrar hasta \$14,580 por año en su cuenta ABE.

El crecimiento de la cuenta está libre de impuestos y sus contribuciones pueden calificar para una deducción estatal de ingresos.

¿Cómo afectan las cuentas ABE al Seguro Social?

Las personas con cuentas ABE que reciben Seguridad de Ingreso Suplementario (SSI) o Medicaid/CentennialCare pueden ahorrar hasta \$100,000 sin que eso afecte a sus beneficios. Cuando la cuenta ABE tiene fondos mayores que \$100,000 (por ejemplo, \$100,045), la SSI y el Medicaid de la persona se pondrán en pausa hasta que la cuenta tenga \$100,000 dólares o menos.



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Part Five: Social Security In New Mexico

Benefits Advisors in New Mexico

- **SE New Mexico:**

Jessica Banda

1014 S. Atkinson
Roswell, NM 88203
505-383-6811 FAX: 575-213-1097
Jessica.banda@dvr.nm.gov

- **SW New Mexico:**

Rudy Hernandez

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Las Cruces, NM 88012
505-383-6642 FAX: 575-205-1715
Rudolph.hernandez@dvr.nm.gov

- **NE New Mexico:**

Andrea Gotcher

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Santa Fe, NM 87505
505-383-6706 FAX: 505-207-2313
andrea.gotcher@dvr.nm.gov

- **Albuquerque Metro/Gallup:**

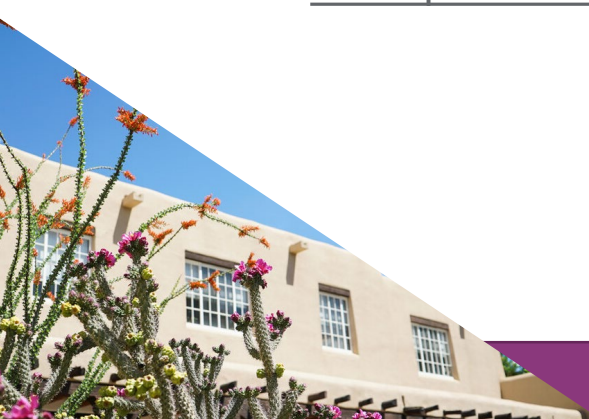
Cynthia Orosco

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- **Lomas/Mountain/Farmington:**

Alonzo Ramirez

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Questions?

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Thank you!