

The Continuing Education (CE) Activity for Non-Attorney Representatives Course Summary

Course Title: Relevant Dates

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Prepared for: Fiscal Year 2019

Presentation Length: 18 minutes 10 seconds

Summary:

This course discusses dates and time periods that are relevant to eligible for direct payment non-attorney (EDPNA) representatives in understanding case development and the effects on claimants.

Objectives:

- Understand how alleged, potential, and established onset dates are determined.
- Identify how unsuccessful work attempts (UWAs), statutory blindness, and previously adjudicated periods effect the establishment of onset.
- Understand what we mean by waiting periods, retroactivity, prescribed periods, and the controlling date.

Key Points:

- The dates used by SSA are relevant in deciding when a claimant's benefit eligibility or entitlement begins and ends, as well as eligibility for other programs.
- There are three different onset dates that we consider: alleged onset date (AOD), potential onset date (POD), and established onset date (EOD).
- A UWA does not preclude establishing an EOD before or within the period the claimant performed that work activity.
- EODs that invade a prior period require specific considerations.
- Claimants who are statutorily blind and meet our requirements are entitled to a "freeze" regardless of whether he or she is performing substantial gainful activity (SGA).
- The present waiting period consists of 5 full calendar months.
- Retroactivity refers to all months before the month of filing that the Title II claimant is eligible to receive benefits if found disabled.
- Prescribed period and the controlling date are claim type specific and apply only to Title II Disabled Widowers Benefits claims.

References:

- **Code of Federal Regulations (CFR):**
 - [20 CFR 404.131](#). When you must have disability insured status.
 - [20 CFR 404.335](#). How do I become entitled to widow's or widower's benefits?
 - [20 CFR 404.630](#). Use of date of written statement as filing date.

- **Social Security Ruling (SSR):**
 - [SSR 18-01p](#) Titles II and XVI: Determining the Established Onset Date (EOD) in Disability Claims
 - [SSR 18-02p](#) Titles II and XVI: Determining the Established Onset Date (EOD) in Blindness Claims

- **Program Operation Manual System (POMS):**
 - [DI 10105.005](#) Eligibility for Disability Insurance Benefits (DIB) or the Disability “Freeze”
 - [DI 10105.070](#) Waiting Period for Disability Insurance Benefits (DIB)
 - [DI 10105.075](#) When The Five Month Waiting Period Is Not Required
 - [DI 11005.050](#) Prescribed Period and Controlling Date
 - [DI 11010.145](#) Unsuccessful Work Attempt (UWA) Overview
 - [DI 25501.220](#) Potential Onset Date (POD)
 - [DI 25501.250](#) Establishing an Established Onset Date by Reopening Prior Disability Filings and Previously Adjudicated Periods
 - [DI 25501.380](#) Establishing the Established Onset Date (EOD) of Statutory Blindness in Title II Disability Insurance Benefits (DIB) Claims
 - [DI 25501.400](#) Established Onset Date (EOD) and Unsuccessful Work Attempts (UWA)
 - [GN 00204.030](#) Retroactivity for Title II Benefits