STETSON LAW

2026 National Conference on Special Needs Planning and Special Needs Trusts

SSI Update

Presented by Kathleen Romig and Jen Burdick
October 21, 2026

STETSON UNIVERSITY
Center for Excellence in Elder Law
Access and Justice For All
www.law.stetson.edu/elderlaw

1

SSI Update with Kathleen and Jen

- SSI Asset Limits Update
- Public Assistance House Hold and Dedicated Accounts
- SSA ant Tech
- Continuing Disability Reviews

2

SSA & Tech

- Appointment Scheduling Calendar (ASC)
- Workload Management (WLM) System
  - Both piloted in Tennessee and Nevada starting in April
  - As of October 17th, expanded to Alabama, Arkansas, American Samoa, Arizona, California, Florida, Georgia, Hawaii, Kentucky, Louisiana, Mississippi, Nevada, New Jersey, New Mexico, North Carolina, Ohio, Oklahoma, South Carolina, Tennessee, and Texas.
  - Appointments are established on the ASC and sent to the WLM for distribution. Note: the office that takes the claim, "keeps ownership and processes the case through adjudication, regardless of claimant residence/jurisdiction."
- MySSA.gov

3