Re: documentation

From: chuck.harold@sbcglobal.net
To: Thomas.Herz@ucop.edu
Date: Friday, April 9, 2010 at 12:51 PM MST

It turns out I am not crazy. I am in the SS office and the guy tells me I was blocked from proceeding because I did not meet the criteria. Anyway ss is completing what they need and a letter will be generated automatically. It will be several weeks until it is mailed but I will be complete with what I can do today.

C.

Sent via BlackBerry from T-Mobile

From: "Thomas Herz" <Thomas.Herz@ucop.edu>
Date: Fri, 9 Apr 2010 11:38:17 -0700
To: Chuck Harold<chuck.harold@sbcglobal.net>
Subject: RE: documentation

I am surprised to hear that you are being prevented from applying for SS disability benefits due to being under 61 as a number of UC people on UCRP disability have applied for SSDI and some have been awarded them despite being considerably younger than 61.

Could it be that there is some other type of SS disability benefits to which you have not been directed that may allow you to submit an application?

Please remember that all we need is something in writing from Social Security Administration stating that you are ineligible for their disability benefits.

I hope this helps.

Tom

From: Chuck Harold [mailto:chuck.harold@sbcglobal.net]
Sent: Friday, April 09, 2010 11:27 AM
To: 'Chuck Harold'; Thomas Herz
Cc: silviazorzoli@yahoo.com
Subject: RE: documentation

I tried to apply for benefits as it stated on the form but it would not let me because it said I need to be 61 years or older. So now what?

From: Chuck Harold [mailto:chuck.harold@sbcglobal.net]
Sent: Friday, April 09, 2010 11:22 AM
To: 'Thomas Herz'
Subject: RE: documentation

Here is the application. Now it says I have to apply for benefits.

From: Thomas Herz [mailto:Thomas.Herz@ucop.edu]
Sent: Friday, April 09, 2010 9:47 AM
To: Chuck Harold
Subject: RE: documentation

Hi Chuck:

We will await a copy from you of the determination made by SSA. Please keep me informed as you know when it can be expected.

Thanks and have a good week-end.

Tom

From: Chuck Harold [mailto:chuck.harold@sbcglobal.net]
Sent: Thursday, April 08, 2010 10:51 PM
To: Thomas Herz
Subject: RE: documentation

Hi Tom,

I think I have figured it out and should have the questionnaire finished by this weekend.

I would like you to check with your legal department about my settlement before you decide on any action regarding my insurance. I think you will find it was a unique case.

Thanks,

C.

From: Thomas Herz [mailto:Thomas.Herz@ucop.edu]
Sent: Tuesday, April 06, 2010 9:42 AM
To: Chuck Harold
Subject: documentation

Hello Chuck:

I would encourage you to call and set up an appointment with Social Security. Many of our retirees have been able to schedule phone appointments and do much of this with SSA staff on the phone. After an initial phone session, it may be necessary to have a follow up at the local SSA office.

In any event, UC does need to see something in writing from SSA that addresses the question of whether or not you are eligible for SS disability as this will determine your potential eligibility for Medicare prior to age 65. Failure to provide this determination, either in the affirmative or negative, can result in an offset fee being imposed on your check and termination of UC medical coverage.

Our office would need something to this effect by May. Please let me know if you have any questions.

Thank you for your assistance in this matter.

Tom Herz
Health & Welfare Administration
University of California, Office of the President
Phone: 510-987-0229
Fax: 510-987-9323