Income Initiatives

The Way Home
Meet the Team

• Stefanie Quintela, Director Strategic Planning (Programs)
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Helping People Experiencing Homelessness Increase and Stabilize their Income is a Primary Goal of the Homeless Response System

Income is Important

- Housing crisis is often the result of a financial crisis
- Millions of people are financially vulnerable to homelessness and housing instability due to:
  - Reduction in work hours
  - Illness
  - Unexpected expense

Helping People Experiencing Homelessness Increase and Stabilize their Income is a Primary Goal of the Homeless Response System
Barriers to Employment/Income

• Lack of education or competitive work skills
• Lack of transportation
• Lack of childcare
• Disabling Conditions
The Way Home CoC Coordinated Access

• Integrates housing assessment with income assessment
• Matches people at risk for homelessness (DIVERSION) to Income Now Program or Shelters to Shutters
• Matches people experiencing homelessness (RRH/PSH) to:
  • SSI/SSDI Outreach and Recovery Program (SOAR) if unable to work due to diagnosed disability
  • Vocational Rehabilitation Services if client has a disability and wants to work
  • Employment programs if unemployed or under employed
Welcome

Welcome to The Way Home’s Partner Agency Portal: where the business of The Way Home Continuum of Care (CoC) happens!

The Way Home is the collaborative effort underway to prevent and end homelessness in Houston, Pasadena, Harris County, Fort Bend County, and Montgomery County, Texas. The Coalition for the Homeless serves as lead agency and HMIS lead agency to The Way Home.
Employment Can Improve:
• Quality of Life
• Mental Health
• Social Networks
• Social Inclusion
It's about work!

Vocational Rehabilitation

A proud partner of the American Job Center network
INCOME NOW Direct Referral to Workforce Solutions
If you Do Not have CA Workgroup Access send Referral via email to agleichenhau@homelesshouston.org
Add WFS Referral

Select Career Office Based on Zip Code

***Only select shelter if client is staying in that shelter***
Why we are committed to YES ...

• Common Complaints about Employment Services --- we know --- and agree! But let’s make sure we have captured some of them...

• No List:
  • Client must come to Career and Recovery Resources, Inc for services.
  • Client must be ready for “higher level jobs” or limited to the job they have currently
  • Case Manager or client have to find additional resources or have right docs before referral

• Yes List:
  • Employment Team understands client housing segregation and transportation limitations... have laptop will travel!
  • We start with what they have and build on that ... entry level is a big “START” if past that move to the next level! Pace and individualization is the method.
  • Work to have all necessary barriers removed. Project ID is available at CRR twice a week, and if that doesn’t work, we will figure it out.
  • Work “Stuff” – Have funding and resources, but will have limitations, so we start small and individualized (assessment sits with Employment Team)
Why we are committed to YES ...

- Common Complaints about Employment Services --- we know --- and agree! But let’s make sure we have captured some of them...

- No List:
  - The client is left on their own once they get the job.
  - It’s a one and done deal... Placement closes the deal and the services.
  - Only “certain” clients are eligible for a referral.

- Yes List:
  - Employment Team’s success is the client staying employable, getting a paycheck, working through barriers and supporting the goal of stable housing!
  - We restart as often as we can ... expect at least six months to stability and many restarts. Our goal is to reduce the impact of restarts and new barriers. Employment like life is developmental.
  - Everyone can be referred, head of household and other adults. Be patient with us while we work out our own barriers!
HMIS Referral
Case Managers

• Follow up and other inquiries
cesintake@careerandrecovery.org
• Work with CRR CCHP Income Support Staff
• Participate in Case Reviews
• Attend Team Meetings
Stefanie Quintela
squintela@homelesshouston.org

Coalition for the Homeless
2000 Crawford St., Suite 700
Houston, TX 77022

(713) 739-7514
info@homelesshouston.org
Agenda

1. Income Now Partnership
2. Referral Process & Job Search Services
3. Financial Aid
4. WFS Operations
INCOME NOW
Income Now

The Way Home
- Coalition for the Homeless & other Providers
- Housing Assessments
- Housing Intervention Programs
- Shelters

Income Now
- Referrals
- Navigator
- Support Services
- Housing & Employment

Workforce Solutions
- Employment Services
- Work Support
- Education and Training
- Child Care

Income Now

The Way Home

Income Now

Workforce Solutions
Income Now Offices

- Acres Homes
- Astrodome
- Baytown
- Clear Lake
- Conroe
- Cypress Station
- East End
- Humble
- Katy

- Northeast
- Northline
- Northshore
- Rosenberg
- Southeast
- Southwest
- Westheimer
- Willowbrook
Sample Referral Email

To: northline@wrksolutions.com

Subject: Incoming Referral

The message will be sent from ASSESSOR NAME (XXXXXXX@YYYYYYY XXX)

This email is to inform you that Coordinated Access is referring <CLIENT NAME> (HMIS ID - XXXXX) to Workforce Solutions - Northline (Income Now).

The client provided the contact information listed below:

Home phone -
Cell phone - 713-XXX-XXXX
Email address -

Thank you,

<ASSESSOR NAME>
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<th>XXX-XX</th>
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<td></td>
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<tr>
<td>Date of Birth:</td>
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<tr>
<td>Referred To:</td>
<td>Workforce Solutions - Northline (Income Now)</td>
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<tr>
<td>Address:</td>
<td>4424 North Freeway, Suite A</td>
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Sample Referral Form – Manual

The Way Home

Income Now Supportive Housing Referral

Date: ________________

To whom it may concern:

This letter is to confirm that ________________ is a client of the The Way Home. ________________ is in need of Workforce Solutions’ assistance in gaining employment and/or increasing income.

This client is eligible for Income Now services from Workforce Solutions.

If you have any questions, please contact me at ________________ and/or ________________.

Sincerely,

______________
Career Office receives an Income Now referral (paper or email)

Staff must outreach customer w/in 1 business day (1st attempt)

Does customer respond?

Yes

Is customer interested in WFS services?

Yes

Provide appropriate employment services and resources

No

Leave a message if possible and attempt outreach at least two more times within a week

Does customer respond?

No

Create a TWIST note with subject line "Income Now – Attempt"

Go to Intake Common, Characteristics, and document homeless status

Create a TWIST note with subject line "Income Now – Declined"

Staff/Customer Interaction

TWIST
Income Now Orientation

• Discuss work interests, values, and preferences
• Identify skills
• WIT profile
  – Job search & Job matching assistance
  – Resume & Interviewing prep
• Adult Education & Literacy
• Work-based learning
• Connect to Vocational Rehab Services or Veteran Rep in office
• Financial Aid
  – Education/Training, Work Support, Childcare
Documenting Services
FINANCIAL AID
How to Qualify for Financial Aid

• Resident of the Gulf Coast Region
• Meet Eligibility requirements
  – Provide supporting documents demonstrating client is referred by a community partner
• Complete Financial Aid Application
  • Second page – additional information
    – Identify whether current nighttime residence is at a motel, car, campsite OR shelter or temporary housing
• Common Information & Documents:
  • Proof of U.S. citizenship or ability to work in the United States
  • Selective Service registration for males born on or after January 1, 1960
Continuing Financial Aid Assistance

• Resident of the Gulf Coast Region
• Meet Eligibility requirements
  – Age, family income level, work and/or school for ≥ 25 hours, provide supporting documents
• Complete Financial Aid Application
• Common Information & Documents:
  • Proof of U.S. citizenship or ability to work in the United States
  • Selective Service registration for males born on or after January 1, 1960
  • Proof of Income for all working household members, including name, address, and phone number of the employer, work hours/days, rate and schedule of pay
  • Proof of household income received from other sources such as Child Support, SSI, etc.
  • Proof of layoff (such as a letter from your employer) and/or unemployment insurance benefit documents
  • Proof of your current school hours and registration that includes documentation of your degree plan (if pursuing one) and your credit/clock hours if you are going to school
Current Data

Average Monthly Income Increase with Income Now (IN) Services

- Avg Monthly Income Before IN: $1,949
- Avg Monthly Income 12 Months After Receiving IN Services: $3,424
Current Service to the Public

• Virtual
  • Phone, Email, Microsoft TEAMS

• Curbside & Face-to-Face
  • Call your local Workforce Solutions office and schedule an appointment
    – Assistance with printing, copying, and/or faxing documents

• Face-to-Face
  • Call your local Workforce Solutions office and schedule an appointment
    – Access to Resource Room floor (computers, phones, printers, fax)
    – Meet with an Employment Counselor for job search needs
    – Meet with Personal Service Representative for scholarships for higher education
Thank you!

Omar Martinez
Income Now Navigator

Omar.Martinez@wrksolutions.com
WHAT WE DO
OUR MISSION
TO PROVIDE FAITH-BASED TRAINING AND COACHING FOR ANYONE WHO DESIRES LONG-TERM EMPLOYMENT.

OUR VISION
A MARKETPLACE WHERE WORK AND FAITH CONNECT.

Many of the people we serve are unemployed and have struggled to find a job. Others have employment but are seeking to improve their soft skills to become better employees. We come alongside each of them and provide training that combines spiritual growth with career skills development so that they can experience long-term success.
JOB SEARCH ACCELERATOR
This virtual and in-person training currently spans 5 days and is segmented into two main areas: How to effectively conduct a modern-day job search and how to set yourself apart in a job interview.

COACHING
With our coaching program, people grow professionally and become more competitive in the marketplace. Our coaches have a combined total of over 150 years of experience in various industries, spanning oil and gas, construction management, engineering, employer development, and much more.

WORKFAITH ACADEMY
This workshop series is designed to help people successfully retain and advance in long-term employment through soft-skills development and Biblical principles.

JOB MATCHING SERVICES
Using our job board, clients can be matched with available employment opportunities from our Core Employers and Corporate Partners.

IMPACT CERTIFICATION
WorkFaith has combined Biblical principles and market best practices to improve soft skills for individuals who desire long-term employment. This certification program is offered online and includes 6-hours of interactive training.
WorkFaith's Theory of Change is the foundation of who we are, what we believe, and what we will do to achieve our vision. We believe in a holistic approach to solving the problem on unemployment in America. Because of that, WorkFaith’s programs and services touch on all aspects of personal, professional, and spiritual development resulting in lives changed by connecting WORK + FAITH.
**OUR STRATEGY**

**COURSES**
- Learn together: Online and in-person training curriculum
- Tailored course selection for individual needs
- Marketplace certifications
- Improve outcomes through technology

**COACHING**
- Achieve together: Group or in-person coaching
  - Navigate obstacles
  - Establish clear goals, objectives, and vision
  - Solve problems
  - Achieve results

**COMMUNITY**
- Build together: Strengthen local economies
  - Build relationships
  - Establish partnerships
  - Connect people through Work+Faith
  - Core employers
  - Corporate partners

**LEARN TOGETHER**
- Online and in-person training curriculum
- Marketplace certifications
- Tailored course selection for individual needs
- Improve outcomes through technology

**ACHIEVE TOGETHER**
- Group or in-person coaching
  - Navigate obstacles
  - Establish clear goals, objectives, and vision
  - Solve problems
  - Achieve results

**BUILD TOGETHER**
- Strengthen local economies
  - Build relationships
  - Establish partnerships
  - Connect people through Work+Faith
  - Core employers
  - Corporate partners

**Our Strategy**
- Faith: Enhanced faith and spiritual development
- Life: Enhanced life skills, social and emotional intelligence
- Leadership: Enhanced leadership and career growth
- Financial: Long-term financial growth and sustainability

**Impact**
- Stronger spiritual and family units
- Stronger and skilled labor force
- Stronger earning power and tax base
- Healthy Christ- and career-centered society

**WorkFaith Connection Intervention**
- **Individual**
- **Community**
- **Legacy**
As men and women return to work, families are provided for and poverty is alleviated. Employed individuals’ need for government assistance is reduced, and—for those with criminal backgrounds—employment greatly reduces recidivism. But above all, work fosters dignity. These transformed men and women become providers, tax payers, and role models in their homes, communities, and our city.
Selim is an astute businessman with 18 years in the oil and gas industry. He has worked in the areas of Oil & Gas, Defense, Aerospace, and has a military background as a pilot in the Honduras Air Force.

He came to WorkFaith after being laid off from his job in the Oil & Gas Industry in 2020 and needed assistance with his resume and tips on how to interview effectively. He elected to work with the Coaches of WorkFaith and after many mock interview sessions, he was ready to take off and start his job search. Selim’s job search journey was not an easy one and sometimes he felt defeated. His initial results yielded a mountain of no’s but in a final attempt to secure employment in the Oil & Gas industry, God saw fit to grant him the favor he needed with Golden Pass LNG through a job offer from them after a long-running interview process. He is now an IT Program Manager and is thriving in his new career.

Selim credits his success to having faith in God and persevering even when he was at his lowest moments. He also recognizes the WorkFaith coaching department who prayed with him and encouraged him during those times. He is a fine example of how TRUSTING in GOD and having FAITH yields WORK! Praise God for what He is doing in the life of Selim!
Providing faith-based training and coaching for anyone who desires long-term employment.
A Ticket to Work provides free employment services (vocational rehabilitation, training, job referrals, etc...) 

Through the Ticket program, you work with a service provider to identify your employment goals, as well as the supports and services you need to succeed.

Participation is voluntary and free.

While the ticket is in use, no medical reviews are conducted.
Who Qualifies?

- Social Security Disability (SSDI) or Supplemental Security Income Disability (SSI) entitlement
- between the ages of 18 & 64
- Social Security no longer sends paper Tickets in the mail (a paper Ticket is not required to participate)
How do I get started?

- Call the **Ticket to Work Helpline** at **1-866-968-7842 / TTY 1-866-833-2967**
- available M-F, 8am-8pm ET
- Customer service representatives will **help you find the best service provider** for your needs
- They can also **answer questions** about Ticket to Work and Work Incentives
- They will **mail** a list of service providers or direct you to: [https://choosework.ssa.gov/findhelp/](https://choosework.ssa.gov/findhelp/)
Choose Work! - Ticket to Work - Social Security
https://choosework.ssa.gov/index.html

The Ticket to Work program provides Social Security disability beneficiaries...beneficiaries who want to work with access to free employment support...
Find Help to Achieve Your Work Goals

Ticket to Work service providers offer Social Security disability beneficiaries (persons who receive SSI or SSDI) age 18 through 64 who want to work with free job support.

Services offered may include job coaching, job counseling, training, benefits counseling and job placement.

The tools on this page can help you find a service provider to help you find employment support.

Different Providers, Different Services

Each type of service provider offers different services. It's important to understand, in general, what each provider does before searching, so you can select the type that can best help you. Learn more about Ticket to Work service providers.

Once you have selected the type of service provider, it is also important to understand that even the same type of provider can provide you a different mix of services. If you choose to work with an Employment Network or Workforce Employment Network, the Finding an EN and Assigning Your Ticket Worksheet can help you interview service providers to find the best one for you.

Two Ways to Search:

Once you understand the different providers available, there are two ways you can search.

Option 1: Guided Search

The Guided Search asks a series of questions to determine your readiness for the program and provides a list of service providers that are a best fit for you.

Start Your Guided Search

- OR -

Option 2: Direct Search

Use the Direct Search to view a list of service providers serving your ZIP code. This tool can search based on the type of provider and whether services are provided in person or virtually.

Results can be narrowed further by services offered, disciplines served, or other specialized expertise.

Start Your Direct Search
Who can help me?
Service Providers include:

• Employment Networks (EN)
• State Vocational Rehabilitation (VR) Agencies
• Work Incentives Planning & Assistance Projects (WIPA)
• Workforce Employment Networks (WF)
• Protection and Advocacy for Beneficiaries of Social Security (PABSS)
Texas VR Agency

• The Texas Workforce Commission (TWC) is the State Vocational Rehabilitation Agency for Texas

• TWC call center: 512-936-6400

• Email ticket@twc.state.tx.us
Work Plan

- Once you select a service provider, you and your service provider will develop a plan to help you reach your work goals.

- The agreement is called an Individual Work Plan (IWP), an Individualized Plan for Employment (IPE) or an Individual Employment Plan (IEP), depending on the type of service provider you choose.
Timely Progress

• Social Security reviews your progress regularly to determine if you are making progress toward your work goals within timeframes that your service provider explains to you.

• Timely progress means actively pursuing your employment goals.

• Timely Progress Reviews not only consider your work and earnings, but also any training or education you’ve received to help you find and maintain employment.

• If Social Security determines you are not making timely progress toward your goals, you are subject to a regularly scheduled Medical Continuing Disability Review.
Ticket Notices

Your Ticket to Work:

What You Need To Know To Keep It Working For You

Congratulations on your participation in the Ticket to Work program. We hope this publication is informative and helps you to be successful in the program.

Will you review my disability while I am in the program?

We will not review your disability as long as you make progress in the Ticket to Work program. (If we started a disability review before you began participating, we will finish the review.) If you have any questions about the Ticket to Work program, call the Ticket Help Line, toll-free, at 1-866-968-7842 (TTY 1-866-833-2967).

How does Social Security determine my progress?

Your participation in the Ticket to Work program began when you signed an agreement with an Employment Network or State Vocational Rehabilitation agency. With their help, you developed an employment plan. While you are in the program, we will review your progress in achieving the goals of your employment plan. The enclosed Timely Progress Review Chart page explains how we determine whether you are making timely progress.

The Timely Progress Review Chart on a following page explains how we determine whether you are making timely progress.
Timely Progress Reviews

Ticketholders must achieve at least one of the requirements listed for their particular review period before we find that they have made timely progress for that review period. The review period is at least 12 months long, and there is usually one review a year.

First Review
• 3 months of work at or above the Trial Work Level amount ($970 in 2022); or
• Complete at least 60% of a full-time course load for an academic year in a 2-year or 4-year college or a technical, trade, or vocational training program; or
• Complete a combination of the above work and education requirements; or
• Obtain a GED or high school diploma.
Second Review

- 6 months of work at or above the TWL-amount; or
- Complete at least 75% of a full-time course load for an academic year in a 2-year or 4-year college or a technical, trade, or vocational training program; or
- Complete a combination\(^2\) of the above work and education requirements.

Third Review

- 9 months of work at or above Substantial Gainful Activity (SGA) ($1350 in 2022) amount; or
- Complete a full-time academic year at a 4-year college; or
- Complete a combination\(^2\) of the above work and education requirements; or
- Complete a 2-year college program and earn a degree or certificate; or
- Complete a technical, trade, or vocational training program.

Fourth Review

- 9 months of work at or above SGA\(^1\) amount; or
- Complete a full-time academic year at a 4-year college; or
- Complete a combination\(^2\) of the above work and education requirements.
Timely Progress Reviews – Con’t

Fifth Review
• 6 months of work and have earnings in each of those 6 months that prevent payment of Social Security Disability Insurance (SSDI) and Federal Supplemental Security Income (SSI) cash benefits; or
• Complete a full-time academic year at a 4-year college; or
• Complete a combination of the above work and education requirements; or
• Complete a 4-year college program and earn a degree or certificate.

Sixth Review
• 6 months of work and have earnings in each of those 6 months that prevent payment of SSDI and Federal SSI cash benefits; or
• Complete a 4-year college program and earn a degree or certificate.

Seventh Review and Any Additional Reviews
• 6 months of work and have earnings in each of those 6 months that prevent payment of SSDI and Federal SSI cash benefits.
Working and Your Benefits

How do my earnings affect my benefits?

If you work and over time have 9 months of earnings at or above the trial work level, and reach substantial earnings, we may stop your Social Security Disability Insurance (SSDI) benefits. We can quickly start your benefits again if your income drops or you stop work and are still disabled.

Supplemental Security Income (SSI) payments are reduced until your earnings have reached a high enough level that you no longer receive your benefit payment. We count less than one-half of your earnings when figuring your SSI payment amount.
Always Report your Work to SSA

• **Call** your local SSA office or 1-800-772-1213 (ask for a Work Report receipt!)

• Submit pay-stubs **online** through your *my* Social Security account

• **Fax** or mail the information

• **SSI** recipients can report via the telephone or mobile wage reporting applications.
Call the Ticket to Work Help Line

Do you have questions about Ticket to Work or are ready to get started? Our Ticket to Work Help Line is staffed with knowledgeable and friendly people who can answer your questions about the program, get you enrolled and connect you with free employment services.

Experts are available Monday – Friday, 8 a.m. – 8 p.m. ET. Call 1-866-968-7842 or 1-866-833-2967 (TTY).
Questions?

Securing today and tomorrow

Produced at U.S. taxpayer expense
SSA Work Incentives
Working While Disabled: How We Can Help

Publication No 05-10095 ICN 468625
SSDI Work Incentives

**Trial Work Period (TWP):** You can try to work for 9 months and still receive the full SSDI benefit. The 9 months do not have to be consecutive. The TWP is completed when 9 months are accumulated within a rolling 60-month period.

**Extended Period of Eligibility:** 36 month period following the TWP. Benefits are paid for months below the substantial gainful activity (SGA) level ($1,350) or $2260 for Blind individuals. Benefits are suspended for months over the SGA level.

**Medicare Continuation:** 93 months following the TWP
TWP 60 month rolling period example:

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SocialSecurity.gov
Extended Period of Eligibility (EPE)

- The EPE **begins** the month after the 9 month Trial Work Period ends, even if you are not working that month.

- During the **36 month EPE**:
  - if monthly earnings are **below** SGA, benefits are **payable**
  - if monthly earnings are **above** SGA, benefits are **suspended**

- Benefits continue for the **1st month of SGA** and the following **2 months** (called the grace period).

- After the 36th EPE month, if your earnings are **below** SGA, benefits will continue until you earn over SGA or Medically recover.
### Example: SGA 4/17 & continuing

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</tbody>
</table>
Medicare Continuation

• If cash benefits stop due to work, Medicare can continue for up to **93 months** following the Trial Work period.

• To qualify, beneficiary must already have Medicare and be working at SGA level but not medically improved.
Medicare for Persons with Disabilities Who Work

After premium-free Medicare coverage ends due to work, a disabled individual may **buy** continued Medicare coverage as long as he/she remains medically disabled.

To qualify, the individual:
• must be under age 65, and
• continue to have a disabling impairment, and
• Medicare must have stopped due to work.

Hospital Insurance (Part A) is available for $499.00 per month in 2022. Supplemental Medical Insurance (Part B) is available for $170.10 per month in 2022.
Work Incentive Programs

**SSDI Only**
- Trial Work Period (TWP)
- Extended Period of Eligibility (EPE)
- Medicare Continuation

**Both**
- Expedited Reinstatement (EXR)
- Impairment Related Work Expenses (IRWE)
- Plan for Achieving Self Support (PASS)
- Subsidy and Special Conditions

**SSI Only**
- Earned Income Exclusion
- Blind Work Expenses (BWE)
- Student Earned Income Exclusion
- Medicaid while Working 1619(b)
SSI Work Incentives

• Less than 1/2 of your earnings are countable
• Medicaid can continue while you work
• Students under 22 have an earned income exclusion: 2022: $2040/month (max: $8230/year)
• Blind Work Expenses
**SSI Example – Part time job (2021)**

- You earn **$885 a month** (no other income):

  Wages $885
  - $ 20 (general income exclusion)
  - $ 65 (earned income exclusion)

  $800 divided by 2 = **$400 countable income**

  $841 (SSI maximum)
  - $400 (countable income)

  **$441 SSI check + $885 wages = $1326 total**

SocialSecurity.gov
How does it work?

• After you return to work, Medicaid coverage can continue (if needed to work), even if your earnings become too high for an SSI cash payment.

• In TEXAS, the 2022 threshold is $45,355.

Do you need to apply?

You do not need to file a special application; just keep us up to date on your work activity.
If you are **under age 22** and **regularly attending school**, we do not count up to $2,040 of your earned income **per month** when we figure the SSI payment amount. The **maximum** yearly exclusion for 2022 is $8,230.

“**Regularly Attending School**” means:

- in a college or university for at least 8 hours a week, or
- in grades 7-12 for at least 12 hours a week, or
- in a training course to prepare for employment for at least 12 hours a week (15 hours a week if the course involves shop practice), or
- for less time than indicated above for reasons beyond the student’s control, such as illness, or
- home schooling, if instructed in grades 7-12 for at least 12 hours a week.
Blind Work Expenses (SSI only)

• For Blind individuals who work and receive SSI, **all expenses that enable the person to work** can be excluded from earned income.

• The expense does **not** need to be related to the blindness.

• **Examples:** service animal, transportation to/from work, taxes, meals eaten at work, medical, attendant, etc.....
Work Incentive Programs

SSDI Only
- Trial Work Period (TWP)
- Extended Period of Eligibility (EPE)
- Medicare Continuation

BOTH
- Expedited Reinstatement (EXR)
- Impairment Related Work Expenses (IRWE)
- Plan for Achieving Self Support (PASS)
- Subsidy and Special Conditions

SSI Only
- Earned Income Exclusion
- Blind Work Expenses (BWE)
- Student Earned Income Exclusion
- Medicaid while Working 1619(b)
SSDI and/or SSI Employment Supports

- Impairment-Related Work Expenses \((\text{IRWE})\)
- Subsidies and Special Conditions
- Unsuccessful Work Attempt \((\text{UWA})\)
- Expedited Reinstatement \((\text{EXR})\)
- Plan to Achieve Self-Support \((\text{PASS})\)
- Ticket to Work \((\text{TTW})\)
Impairment-Related Work Expenses (IRWE)

We deduct the cost of certain impairment-related items and services that are needed to work from gross earnings when we decide if your work is SGA.

Example:
Beneficiary is earning $1380.00 per month in gross wages which is above SGA. His monthly co-pay for his medications is $50.00.

$1380 - $50 = $1330 (under 2022 SGA $1350)
# Impairment-Related Work Expenses (IRWE)

<table>
<thead>
<tr>
<th>Type of Expense</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation Costs</td>
<td>The cost of structural or operational modifications to vehicle that is needed to travel to work. The cost of driver assistance or taxicabs if public transportation is not available or not accessible.</td>
</tr>
<tr>
<td>Attendant Care Services</td>
<td>Services performed in the work setting. Services performed to help prepare for work, the trip to and from work and after work.</td>
</tr>
<tr>
<td>Service Animals</td>
<td>Expenses paid in owning a guide dog or other service animal that enables beneficiary to overcome functional limitations in order to work.</td>
</tr>
<tr>
<td>Medical Devices</td>
<td>Deductible devices include wheelchairs, dialysis equipment, pacemakers, respirators, traction equipment, and braces.</td>
</tr>
<tr>
<td>Prosthesis</td>
<td>Artificial hip, artificial replacement of an arm, leg, or other parts of the body.</td>
</tr>
<tr>
<td>Residential Modifications</td>
<td>Employed outside of home - modifications to exterior to permit access to the street or transportation. Self-employed at home - modifications inside to create workspace to accommodate impairment.</td>
</tr>
<tr>
<td>Prescription Drugs</td>
<td>Regularly prescribed medical treatment or therapy that is necessary to control disabling condition. This includes co-payments and insurance deductibles.</td>
</tr>
<tr>
<td>Other Items and Services</td>
<td>Assistive technology that people with disabilities use for employment-related purposes; such as software applications, computer support services, and special tools which have been specifically designed to accommodate the person’s impairment</td>
</tr>
</tbody>
</table>
What is a subsidy?

- A “subsidy” is support provided by your employer that may result in you receiving more pay than the actual value of the services you perform.

What are special conditions?

- “Special conditions” refer to support and on-the-job assistance provided by your employer, or by someone other than your employer, for example, a vocational rehabilitation agency. Because of this support, you may receive more pay than the actual value of the services you perform.
An Unsuccessful Work Attempt (UWA) is an effort to do work, in employment or self-employment, which you stopped or reduced to below the SGA level after a short time (6 months or less) because of:

• your impairment, or
• removal of special conditions related to your impairment that you needed to help you work.
Beneficiaries complete this form to document special conditions, subsidies, and IRWEs so decisions are based on the real value of the work.

Form SSA-821 Work Activity Report

<table>
<thead>
<tr>
<th>Yes</th>
<th>Special Condition</th>
<th>Employer Name</th>
<th>Date (MM/YYYY to MM/YYYY)</th>
<th>Please Describe</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Had extra help, extra supervision or a job coach</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Worked irregular or fewer hours than other workers</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Given special equipment because of my condition</td>
<td></td>
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<tr>
<td></td>
<td>Took more rest periods than other workers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Given special transportation to and from work</td>
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</tr>
</tbody>
</table>

SSA-821 is used to document work activity and work incentives when SSA is making SGA decisions.

7. Do or did you spend any of your own money for items or services related to your physical and/or mental condition(s) that you needed in order to work and for which you did not get reimbursed? (For example: medicines or co-pays, medical devices or procedures, Braille equipment, special telephone or equipment, service animal, attendant care, modifications to a car used for work, or other special transportation.) We may ask you for proof of payment.

- NO. I did not spend any of my own money for items or services related to my physical and/or mental condition.
- YES. Please tell us what you paid below. Do not show any expenses that have been or will be paid by an insurance company, other organization, or other person.

<table>
<thead>
<tr>
<th>Describe Item or Service</th>
<th>Cost</th>
<th>Date Paid (MM/YYYY-MM/YYYY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Service animal</td>
<td>$100 per day, week, month, or year</td>
<td>01/2000 - 02/2000</td>
</tr>
</tbody>
</table>

$__________ per __________
What is EXR?
EXR is your safety net if your cash benefits end because of your work. If you make less money or you have to stop working because of your disability, we may be able to restart your benefits right away if:

• you stop working above the SGA level, and
• your disability is the same as or related to your current disability, and
• you make your request within 5 years of when your benefits end.

How does EXR help you?
• The EXR provision allows you to receive up to 6 months of temporary cash benefits while we conduct a medical review to decide if we can reinstate your benefits. You may also be eligible for Medicare and/or Medicaid during this provisional benefit period.
Initial Reinstatement Period (IRP):

• The month we reinstate your disability payments begins your initial reinstatement period (IRP).
• The IRP can last for 24 months (not necessarily consecutive), and ends when you have received 24 months of payable benefits.
• If you receive SSDI benefits, we can pay you for any month during the IRP that your earnings are not substantial gainful activity (SGA).
• If you receive SSI benefits, the normal income counting rules apply.

New TWP and EPE:

• After 24 months of EXR payments, you are entitled to a new Trial Work Period (TWP) and Extended Period of Eligibility (EPE).
What is a PASS?

A PASS is a written plan that lets you set aside your income (other than your SSI benefit), and other things you own for a specified time to help you reach your work goal.

A PASS describes the steps you will take and the items and services you will need to reach your work goal.
PASS Example

• Maria wants to go to school and become a paralegal.
• She receives $900 in SSDI benefits.
• Maria determines she needs $880 per month for tuition, books, and school supplies. We can deduct the $880 in school expenses from her SSDI benefit and deduct the remaining $20 (general SSI exclusion) so that her SSDI benefit is not countable income and she is eligible for the full SSI payment of $841 (for 2022).
• Maria must use the SSI payment of $841 (& $20 of SSDI) for living expenses and use the PASS funds of $880 for approved plan expenses.
How to Locate PASS Cadres

Social Security Online - Location of PASS Cadres
https://www.ssa.gov/disabilityresearch/wi/passcadre.htm

...the PASS cadres, SSA employees that assist beneficiaries with the PASS program...Self-Support (PASS) "cadres" of SSA employees who are experts in...
Responsibilities When Beneficiary Returns to Work

Notify Social Security of any changes in work activity:

• Start or stop work;

• Work has been reported but duties, hours, or pay have changed;

• Start paying for expenses that are needed to work due to the disability.
How to Report your Work

- **Call** your local SSA office or 1-800-772-1213 (ask for a Work Report receipt!)

- Submit pay-stubs **online** through your *my Social Security* account

- **Fax** or mail the information

- **SSI** recipients can report via the telephone or mobile wage reporting applications.
What should I do if I get a call claiming there's a problem with my Social Security number or account?
my Wage Report

Social Security Statement
A Message from the Acting Commissioner:
✓ Your Social Security Statement …

Estimated Benefits at Full Retirement Age (67): Not applicable
Last Reported Earnings: $0 in 2016

Benefits & Payments
You are receiving: Social Security (Disability) View Benefit Details
Your next payment is: $230.20 on April 3, 2017 View Payment History

Get a Benefit Verification Letter
Need proof that you applied for Social Security benefits? Here’s your official letter.

Report Wages
Submit Paystub Information
If you are receiving Social Security Disability and are working, or are a representative payee for someone receiving Social Security Disability, you may report wages online.

Social Security Card Replacement

Notify SSA of employment & EIN
my Wage Report

Wage Reporting

Choose Wage Earner

Whose wages are you reporting?

- Myself (***-**-0000)
- Jane Doe (***-**-0000)

If you need to report wages for a wage earner who is not listed above, please contact your local field office or contact us.

Next  Exit

OMB No. 0000-0000 | Privacy Policy | Privacy Act Statement | Accessibility Help

SocialSecurity.gov
my Wage Report

Wage Reporting

Choose Employer

Select an employer below to report wages for:

Employer reports are entered one at a time. After entering wages for your first employer, you will have the option to report for additional employers on the list below.

<table>
<thead>
<tr>
<th>Employer 1</th>
<th>123 Address Lane, Baltimore, MD 12345</th>
<th>Start Date: January 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer 2</td>
<td>123 Address Lane, Baltimore, MD 12345</td>
<td>Start Date: January 2017</td>
</tr>
<tr>
<td>Employer 3</td>
<td>123 Address Lane, Baltimore, MD 12345</td>
<td>Start Date: January 2012</td>
</tr>
</tbody>
</table>

If you need to report wages for an employer not listed above, or have self-employment earnings to report, please contact your local field office or call 1-800-772-1213.
SSI

Telephone Wage Reporting

• call 1-866-772-0953
• first week of each month
• report wages for the ‘prior’ month
• report ‘gross’ Wages
• ‘gross’ means the total ‘before’ deductions
SSI Mobile Wage Reporting

Report wages from your mobile device

SSI Mobile Wage Reporting Smartphone App
Work Incentive Guides

Working While Disabled: How We Can Help

Red Book
A Summary Guide To Employment Supports For Persons With Disabilities Under The Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) Programs

SocialSecurity.gov
Locating Information

Social Security

Replacement Social Security Card
Check Application or Appeal Status
People Helping Others
Contact Us
Forms

Publications
Calculators
Social Security Statement
Direct Deposit
Closings & Emergencies
Questions?

Securing today and tomorrow