

# Work Incentives Network

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## Steps to benefits planning:

Submit a referral

Referral gets distributed to a Work Incentives  
Coordinator (WIC)

WIC contacts you and sends out paperwork to be  
completed and returned

WIC receives paperwork back and faxes Social Security  
to confirm benefits- both State and Federal

Meeting takes place to discuss employment goals and  
work history

Report is written by WIC and discussed with  
Consumer/Parents/Supports

# Things to bring to the first meeting

- Letters from Social Security
- Pay Stubs
- Any verification of other Benefits received
- Work history since applying for Social Security, if any



# SSI

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**SUPPLEMENTAL SECURITY INCOME  
NEEDS BASED BENEFIT**

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**FEDERAL BENEFIT RATE: \$943  
RESOURCES MUST BE UNDER \$2000 TO QUALIFY FOR SSI**

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# **SSI Work Incentives**

**IRWE, BWE, SEIE, SPECIAL CONDITIONS**

# Impairment Related Work Expenses and Blind Work Expenses

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**IRWE:** An expense that is paid out of pocket. Includes costs related to the disability that allows the consumer to work.

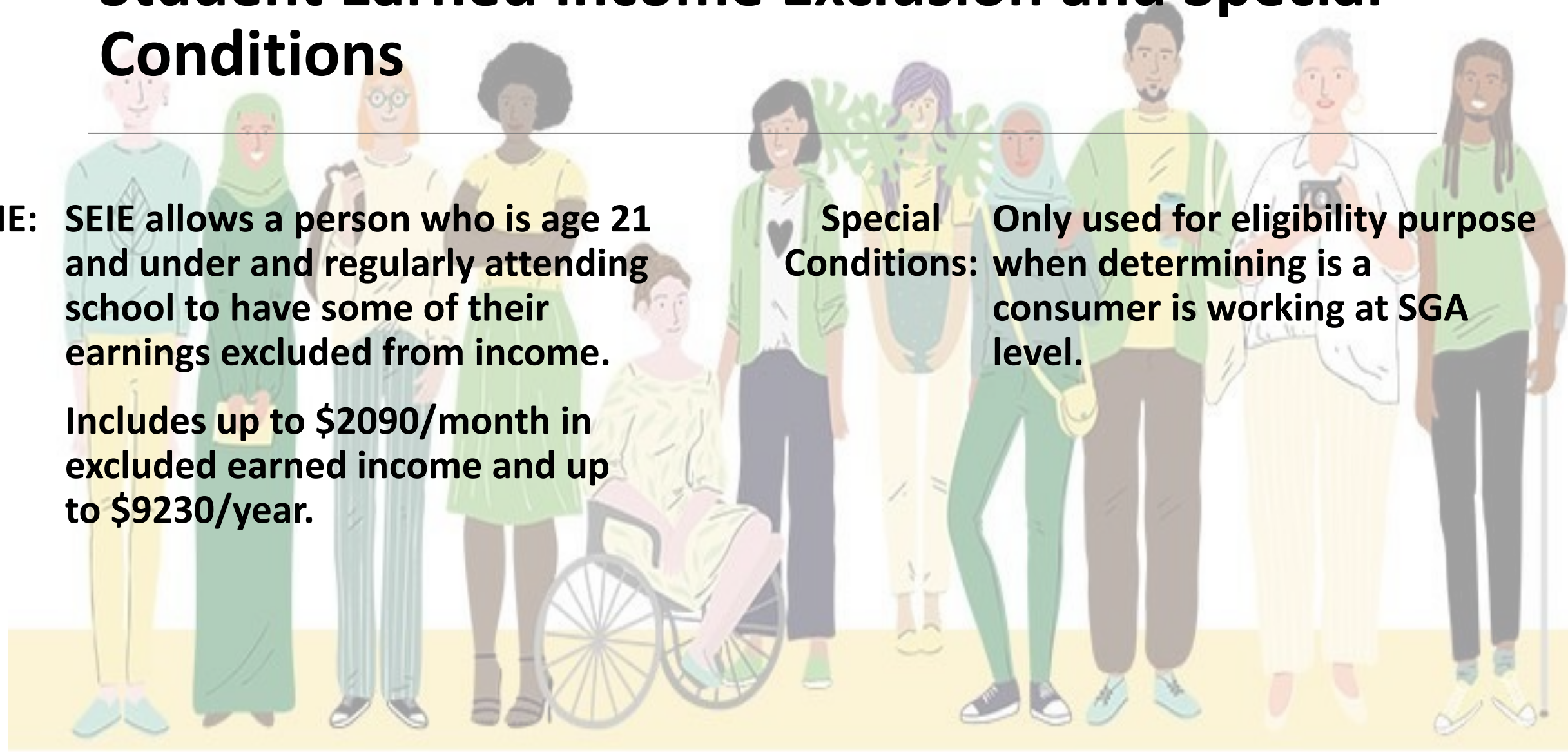
**BWE:** Includes most expenses related to the consumers ability to work but not necessarily related to blindness.

# Student Earned Income Exclusion and Special Conditions

**SEIE:** SEIE allows a person who is age 21 and under and regularly attending school to have some of their earnings excluded from income.

Includes up to \$2090/month in excluded earned income and up to \$9230/year.

**Special Conditions:** Only used for eligibility purpose when determining if a consumer is working at SGA level.



# Work Incentives for Medicaid

**1619b is a work incentive for SSI that allows someone whose SSI check drops to zero to keep their Medicaid. The threshold is \$42,955; however, this number can be adjusted if medical expenses are higher. Must have under \$2,000 in resources to continue to qualify. There are work incentives that can keep your resources under \$2000.**

**Employed Persons with Disabilities (EPD)-**



**“ Know your limits, but never stop trying to break them. ”**

**– Kyle Maynard**





# Title II

**SSDI, CDB, DWB**

# Social Security Disability Insurance and Childhood Disability Benefits

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## SSDI

- Based off of a persons' prior work record.

## CDB

- Based off of a parent/guardians' work record.



# **Title II Work Incentives**

**TWP, EPE, CESSATION/GRACE PERIOD, SUBSIDY,  
SPECIAL CONDITIONS, UWA, IRWE**

# Trial Work Period and Extended Period of Eligibility

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## TWP:

- ❑ 9 months, not consecutively.
- ❑ If earnings are over \$1110 you use a TWP month.
- ❑ Make as much as you want during those 9 months.
- ❑ If you don't use all 9 in 5 years, you start to gain them back.

## EPE:

- ❑ If all 9 TWP months are used, you get 2 months grace period and 1 month cessation, consecutively.
- ❑ If your earnings stay under Substantial Gainful Activity (SGA) for the current year you still receive a check.
- ❑ SGA for 2024 is \$1550/\$2950 monthly.

# Subsidy and Special Conditions

**Subsidy:** A percentage Social Security subtracts from your earnings based off of assistance you receive during work.

**Special Condition:** Can be deducted from earnings to show that a consumer is working below SGA level.

# Unsuccessful Work Attempt and Impairment Related Work Expenses

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**UWA:** If you stop or reduce your work below SGA because of removal of Special Conditions or your impairment after working 6 months or less.

**IRWE:** An expense that is paid out of pocket. Includes costs directly related to the disability that allows the consumer to work.

# TWP / EPE / EXR Tracking Chart Example

YEAR 1	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Countable Earnings												
Benefit Status												
YEAR 2	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Countable Earnings												
Benefit Status												
YEAR 3	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Countable Earnings												
Benefit Status												
YEAR 4	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Countable Earnings												
Benefit Status												
YEAR 5	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Countable Earnings												
Benefit Status												



# Ways to save

## ABLE

- To be eligible your disability must have happened before age 26.
- Up to \$18,000 can be deposited annually with employed individuals able to deposit an additional \$14,580 a year.
- Up to \$100,000.

## PASS

- PASS lets a disabled individual set aside money and resources to pay for items or services needed to achieve a specific work goal.

## SPECIAL NEEDS TRUST

A special needs trust is a federally approved way for people with disabilities to protect benefits while still maintaining assets over the \$2,000 limit required for most government benefits.

# Our team locations across the state

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**HASL**

Grants Pass

**EOCIL**

Ontario

**ILR**

Portland

**ABILITREE**

Bend

**LILA**

Salem/Eugene

**SPOKES**

Klamath Falls

# Questions?

A row of colorful silhouettes representing various types of disabilities. From left to right: a yellow silhouette of a person walking; a blue silhouette of a person in a wheelchair; a green silhouette of a person in a wheelchair; an orange silhouette of a person in a wheelchair; a purple silhouette of a person in a wheelchair; a teal silhouette of a person in a wheelchair; and a pink silhouette of a person walking. The silhouettes are arranged in a line, with some overlapping.

# THANK YOU

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