

# Recent Social Security & SSI Changes

## *At-A-Glance*



### Substantial Gainful Activity (SGA) Rule:

- ◆ \$1,010 per month, gross earnings... calendar year 2012
- ◆ \$1,000 per month, gross earnings... calendar years 2010 and 2011
- ◆ \$980 per month, gross earnings... calendar year 2009
- ◆ \$940 per month, gross earnings... calendar year 2008
- ◆ \$900 per month, gross earnings... calendar year 2007
- ◆ \$860 per month, gross earnings... calendar year 2006
- ◆ Earlier calendar years: \$830 per month, gross earnings (2005); \$810 per month (2004); \$800 per month (2003); \$780 per month (2002); \$740 per month (2001)
- ◆ \$700 per month, gross earnings... 7/99 through 12/00

**NOTE:** The 2012 SGA amount for persons who are statutorily blind is \$1,690 per month. The 2009, 2010 and 2011 SGA amount for the blind was \$1,640 per month. It was \$1,570 in 2008, \$1,500 in 2007, \$1,450 in 2006, \$1,380 in 2005, and \$1,350 per month in 2004.

### Trial Work Period (TWP)

- ◆ Applies only to Social Security Disability Insurance (SSDI); first 9 months, within 60 consecutive months, that earnings are sufficient for a TWP “services month.”
  - \$720 per month, gross earnings meets services month criteria in 2010, 2011 and 2012
  - \$700 per month, gross earnings ... calendar year 2009
  - \$670 per month, gross earnings ... calendar year 2008
  - \$640 per month, gross earnings ... calendar year 2007
  - \$620 per month, gross earnings ... calendar year 2006
  - \$590 per month, gross earnings ... calendar year 2005
  - Earlier calendar years: \$580 per month, gross earnings (2004); \$570 per month (2003); \$560 (2002); \$530 per month (2001)

### SSI's Student Earned Income Exclusion

- ◆ \$1,700 per month, up to a maximum of \$6,840 per year... calendar year 2012
- ◆ \$1,640 per month, up to a maximum of \$6,600 per year... calendar years 2009 - 2011
- ◆ \$1,550 per month, up to a maximum of \$6,240 per year... calendar year 2008
- ◆ \$1,510 per month, up to a maximum of \$6,100 per year... calendar year 2007

**NOTE:** Applies to students under age 22, attending high school, college, or vocational training.

### Section 1619(b) Medicaid

- ◆ This allows automatic Medicaid to continue if person loses SSI because of wages.
- ◆ For calendar year 2012, New York's earned income threshold is \$46,318 per year.
- ◆ If annual wages are below \$46,318 and the other criteria are met, Medicaid will continue.

### Extended Period of Medicare Eligibility

- ◆ When an SSDI recipient goes to work Medicare continues for the nine-month trial work period and at least 93 additional months.
- ◆ Prior to October 2000, this rule allowed Medicare to continue for the nine-month trial work period and 39 additional months.

### Expedited Reinstatement of SSI or SSDI Benefits

- ◆ Effective 1/1/01, an SSI or SSDI recipient who lost benefits due to wages can apply for reinstatement and have benefits reinstated (without a new application) if they apply within 60 months of the last month of eligibility, and they meet all eligibility requirements.