

## Recent Social Security & SSI Changes

### Substantial Gainful Activity (SGA) Rule:

- ◆ \$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
- ◆ \$500 per month, gross earnings... 1/90 through 6/99

NOTE: The 2009 SGA amount for persons who are legally blind is \$1,640 per month. It was \$1,570 in 2008, \$1500 in 2007, \$1,450 in 2006, \$1380 per month 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”.
  - \$700 per month, gross earnings meets services month criteria in 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)
  - \$200 per month, gross earnings... met services month criteria, 1/90 through 12/00

### SSI's Student Earned Income Exclusion

- ◆ \$1,640 per month, up to a maximum of \$6,600 per year... calendar year 2009
- ◆ \$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 2009, New York's earned income threshold is \$43,421 per year
- ◆ If annual wages are below \$43,421 and the other criteria is met, Medicaid will continue

### Extended Period of Medicare Eligibility

- ◆ Effective 10/00, when an SSDI recipient goes to work Medicare continues for the nine-month trial work period and at least 93 additional months.
- ◆ Prior to 10/00, 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.