

Reporting and Record Keeping When you Receive Both SSDI and SSI

Work Incentives Connection Fact Sheet 1.3

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Congratulations on your job! You are responsible for keeping Social Security informed about any work you are doing. Here are some tips to help make reporting and recordkeeping easier for you.

Because you receive **both** SSI and SSDI benefits, you will need to track your earnings two different ways and you may need to make two different reports to Social Security.

When to Report:

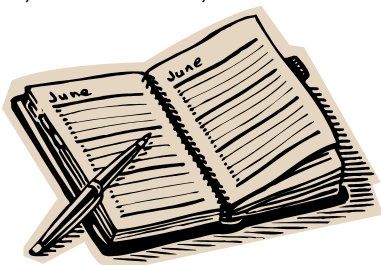
Contact Social Security whenever you:

- Start or stop a job
- Get a raise
- Significantly increase or decrease work hours
- Earn enough that you believe benefits should stop
- Are asked by Social Security to contact them

What You Will Need:

Social Security will want the following information:

- Your Social Security number
- The spelling of your first and last name
- Employer information - company's name, address and phone number
- How much you make per hour
- How many hours you plan to work
- How often you get paid – weekly, every other week, twice a month, etc.



Reporting for your SSDI Benefits:

How to Count Your Earnings:

- Write down the hours worked each day in your SSDI tracking calendar.
- Hours for which you received sick, vacation or holiday pay should be noted on your calendar.
- Add up the total number of hours you worked from the 1st through the last day of the month. Do not include any hours for which you received sick vacation or holiday pay in your calculation.
- Multiply the total number of hours worked by how much you were paid per hour.
- Using your SSDI tracking calendar will help you figure the correct amount of monthly earnings to report to Social Security.



How To Report Your SSDI Earnings:

- Call Social Security toll free at: 1-800-772-1213
- Tell Social Security:
 "I want to make a disability work report."
 "I want a receipt."

If you do not receive a receipt within 10 working days after making your report, call your local Social Security office. Ask to speak to your assigned SSDI Claims Specialist. Explain that you reported your work to the toll free phone number, but did not get a receipt. Ask if you can report your earnings to your local office and ask for a receipt.

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Reporting for your SSI Benefits:

How to Count Your Earnings:

- SSI wants to know your total gross monthly wages before any taxes or deductions
- You can calculate this number by adding up the gross amount of all of your paychecks received each month.
- Circle your pay days in your Connection tracking calendar so you know how many paychecks you will receive each month.
- Using your Connection tracking calendar will help you figure the correct amount of monthly wages to report to Social Security.

How to Report Your Wages for SSI:

- Call your local Social Security office
- Ask to talk to your assigned SSI Claims Specialist. Write down their extension number.
- Ask your Claims Specialist how and when you should report your wages. You may be asked to do one of the following:
 - Use the SSI Telephone Wage Reporting system. You will be sent a packet of information from Social Security on how to do this.
 - Use the SSI Mobile Wage Reporting App.
 - Mail copies of your check stubs at the start of the following month
 - Fax your check stubs at start of the following month
- Write your Social Security number on all paystubs you send/fax to Social Security.
- Write down the date and what your Claims Representative asks you to do and then make

sure you follow this plan for reporting.

- Ask for a receipt any time you report your work directly to your local Social Security office.

Other Information to Tell Social Security:

- Report any medication co-pay costs you pay out of your own pocket, any special transportation costs or mileage for a modified vehicle you take to and from work.
- Save the receipts for these expenses
- Record the amount you spend for these costs monthly in your tracking calendar.

Recordkeeping Tips:

- Keep a phone log (see attached) - write down each call you make to report work, including:
 - Date you called
 - Who you talked to and their phone number
 - What you told them and
 - What they told you
- Save all of your pay stubs in your permanent records. Give copies to Social Security when they request them.
- Keep all paystubs, phone logs, receipts and your Connection tracking calendar in a safe place where you can easily find them.
- Report work to all of your other benefit providers, including the county and subsidized housing since these agencies do not share earnings information with each other. Remember, each of these agencies may count your wages differently.

**WORK INCENTIVES
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**For information about how work may affect
your government benefits, contact the Work**

Incentives Connection at:

651-632-5113 or 800-976-6728

www.mnworkincentives.com

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