

Reporting and Record Keeping for Social Security Disability Insurance (SSDI)

Work Incentives Connection Fact Sheet 1.1

January 2020

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.

When to Report

Call Social Security toll free at: 1-800-772-1213 whenever you:

- Start or stop a job
- Get a raise
- Significantly increase or decrease work hours
- Earn enough that you believe SSDI should stop
- Claim Work Incentives
- 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 and possibly Employer Identification Number (EIN)
- How much you are paid per hour
- How many hours you plan to work
- How often you get paid – weekly, every other week, twice a month, etc.

What You Should Say:

Tell Social Security:

“I am making a disability work report.”

“Please mail me a receipt.”

How to Count Your Earnings:

- Write down the hours worked each day in your SSDI tracking calendar.
- Add up the total number of hours you worked from the 1st through the last day of the month.

- Multiply the total number of hours worked by how much you were paid per hour.
- Counting Holiday, Sick, Vacation time and shift differentials:
 - When you are paid for time you do not work (holiday, sick or vacation time) Social Security does not count that pay. If your paystubs do not clearly separate this pay from your regular work hours, track that time in the NOTES section of your calendar.
 - Report these amounts to SSA when you are providing paystubs and information about your work.
 - If you are sometimes paid a higher rate for hours you work (time and a half for holiday, weekend pay, shift or night differential), all your pay counts as earnings. Make a note for yourself in your calendar how many hours you worked and the higher pay rate. Add that pay to the pay for regular hours worked.
- If you are paid multiple rates on a regular basis, contact the Connection for stickers you can use to make this tracking easier.
- Using your SSDI tracking calendar will help you figure the correct amount of monthly earnings to report to Social Security.

How to Report Your On-Going Earnings:

You must respond to Social Security's requests for on-going earnings information. If you choose to report earnings routinely you can do so after you make the initial call to report work. To report on-going earnings, you can either:

1. Bring your paystubs to your local Social Security office. (Make sure your Social Security number is on the paystubs)

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2. Mail your paystubs to your local Social Security Office. (Make sure your Social Security number is on the paystubs). If you know it, you could write your Claims Specialist's name on the envelope.
3. Create a Social Security account at www.ssa.gov/myaccount/. Certain beneficiaries can report earnings on-line for SSDI as a new feature of *my Social Security*.

Report work to all 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.

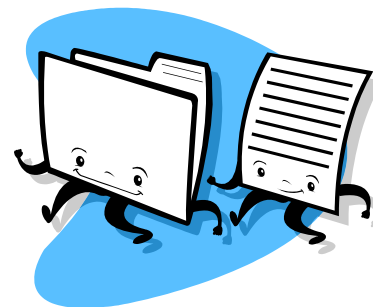
Other Information to Tell Social Security:

- 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 by contacting your local Social Security office.

- Save the receipts for these expenses.
- Record the amount you spend for these costs monthly in your SSDI 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 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's tracking calendar in a safe place where you can easily find them.



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For more information, call the Work Incentives Connection:
651-632-5113 or 1-800-976-6728
www.mnworkincentives.com

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