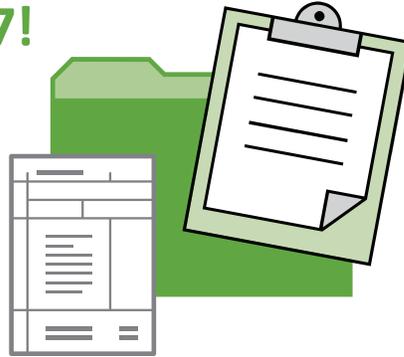


HAPPY NEW YEAR 2017!

IT'S TIME TO GET ORGANIZED!

Now that it is a new year, it is a good time to get organized! Here at the Connection, we want to emphasize the value of gathering and organizing your paystubs, Social Security records and other important paperwork. Lack of recordkeeping or having disorganized paperwork can end up being a source of great anxiety for people. Please consider taking these steps:



- Collect all of your important paperwork for 2016
- Gather your paystubs—print out your online paystubs, store them with your calendar of hours worked and all letters and forms from Social Security and other benefit agencies.
- Put this important paperwork together in a large envelope, a brightly colored file folder or in a Connection “Important Papers” portfolio.
- Keep this all together in a safe place. It will make it easy for you to provide to Social Security and others as needed.
- Call the Connection and ask for a 2017 wage tracking calendar and an “Important Papers” portfolio. The Connection’s 2017 calendars give you step-by-step directions for how to track your earnings in the new year.

Important to know for tax season:

Save hundreds of dollars when filing your taxes by checking to see if you are eligible for free tax preparation. If you make under \$35,000 a year as an individual or \$55,000 as a family you are eligible for free tax preparation.

- Minnesota has over 290 free tax preparation sites where taxes are prepared by IRS-certified volunteers who will help you get your maximum refund. To find a free tax preparation site in your area, visit www.youclaimit.org or dial 2-1-1 or 1-800-543-7709 to talk with a live operator.
- Did your household make less than \$53,505 in 2016? You may be eligible to receive up to \$6,269 from the Earned Income Tax Credit (EITC). To learn if you qualify, visit www.youclaimit.org or dial 2-1-1 or 1-800-543-7709 to talk with a live operator. Eligibility depends on your income and family size. It is believed that one in five people who are eligible for this credit don’t claim it. Be sure to check it out!

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Winter 2017

Annual Recognition: Making Big Decisions!

This year, the Connection recognized over 15 individuals who took bold steps towards independence by increasing work and reducing reliance on government benefits. Each one of these individuals worked with the Connection to understand how their benefits would change if they took steps to meet their goals. Their accomplishments include:

- earning enough to stop both SSI and SSDI payments
- taking a full time job
- being named the Employee of the month at a large employer
- purchasing a home

Congratulations to all of you who took big steps and small steps toward self-sufficiency this year. Your achievement is no small task!

Olmstead Plan and the Work Incentives Connection

In 1999, the US Supreme Court ruled that each state should eliminate unnecessary segregation of persons with disabilities so that they can live and work in the least restrictive settings that meet their needs. This decision led to the Olmstead Act, a federal law that requires states to assure that persons with disabilities have choices to lead lives that are meaningful to them. Minnesota's Olmstead Plan includes goals that remove barriers to housing, transportation and employment.

Because of the Olmstead Act, you have a choice of where to work, how much to work, and what type of work is right for you. The Work Incentives Connection is here to give you accurate and detailed information when you are making important decisions about your benefits and working. We want you to feel confident going forward with building a life that is meaningful to you.

The Work Incentives Connection supports people with disabilities in making choices that are meaningful to them in the areas of employment, financial self-sufficiency, and health care. Connection staff are trained not only to help you understand the impact of earnings on your Social Security and other government benefits, but they will really listen to your plans and hopes for employment in order to give you the most accurate information for your situation and goals. Because of the Olmstead Act, many more Minnesotans who have disabilities have realized that they have skills that employers seek, and more of them are getting competitive jobs with competitive pay.

If you are thinking about going to work, changing your job, or earning more at your job, contact the Connection at 651-632-5113 or 1-800-976-6728.

To learn more about Minnesota's Olmstead Plan go to <https://mn.gov/dhs/general-public/featured-programs-initiatives/olmstead-plan/>.



COMMUNITY MEETINGS: Coming Soon!

The Connection staff will be traveling the state this spring and early summer for our annual community meeting events. Community meetings allow us to share benefits planning information and to hear what your needs are in person. We hope to see you at one of these meetings. If you are on our mailing or email list, you will be getting notice of our community meetings, where they are being held, and how to register.

Work Activity Reports: **What they do for you**

The Connection encourages everyone to respond promptly to Social Security's work activity requests because they can benefit you!

When you start a job, complete your Trial Work Period, or when Social Security needs to make decisions about your earnings and applying work incentives, you will be asked to complete a Work Activity Report form.

- Social Security will send you this form because they need information to update your records. Keeping Social Security up to date on your jobs helps reduce problems later.
- Not responding to Social Security can lead to overpayments or other complications with your benefits.
- Be thorough in completing your report and provide as much information as possible.
- Make sure you include all paystubs for the time period the Work Activity Report covers. Keep paystubs in a safe place for your records for as long as possible so you can access them when Social Security makes the request.
- If you have questions about what you receive from Social Security, you can contact your local Social Security office or the Work Incentives Connection!

SOCIAL SECURITY ADMINISTRATION CHANGES FOR 2017

Social Security Disability Insurance (SSDI) Cost of Living Adjustment: People on SSDI will receive a cost of living adjustment (COLA) of 0.3% for the year 2017.

Medicare Part B Premium: 2017 Medicare Part B premiums will be \$134 a month for newly eligible beneficiaries. Those who have been paying \$104.90 or \$121.80 will be notified by SSA of the amount of their 2017 premium.

Trial Work Period Months (for persons on SSDI): The Trial Work Period is nine months (not necessarily consecutive) during which SSDI beneficiaries can earn as much as they are able without affecting their SSDI checks. In 2017, having gross wages over **\$840** in a month counts as a Trial Work Period month. If self-employed, net monthly earnings over \$840 or working more than 80 hours in a month count as a Trial Work month. Please do not assume someone has their Trial Work Period available, since it may have been used in prior years.

Substantial Gainful Activity (SGA) Level for People on SSDI: The Substantial Gainful Activity (SGA) level increases to **\$1,170** per month in 2017. The SGA for people who are on SSDI because they are blind is **\$1,950** per month in 2017. Countable earnings should be below SGA when:

- Applying for SSI, SSDI or other disability benefits.
- Once benefits are approved, but only after the Trial Work Period has been used. Persons on SSDI, DWB or DAC may lose their cash benefits if their countable earnings go over SGA after the Trial Work Period.
- Special work incentives may allow these individuals to earn more than SGA and still keep their benefits. Call the Work Incentives Connection for further information on this rule.

SSI Federal Benefit Rate: The Supplemental Security Income (SSI) Federal Benefit Rate (FBR) in 2017 is **\$735** for individuals and **\$1,103** for a couple. The FBR is the maximum amount someone on SSI can receive if they have no other income. The FBR is also important in calculating how SSI payment is affected when they work.

Student Earned Income Exclusion (for people on SSI): The Student Earned Income Exclusion enables students under age 22 to keep more SSI when working. A portion of earnings is not counted in determining how much an SSI payment is reduced due to work. In 2017, up to **\$1,790** per month may be excluded, up to a maximum of **\$7,200** per year.

SSI 1619(b): People whose earnings cause their SSI cash payment to be reduced to zero may be eligible for continued Medical Assistance coverage through the SSI 1619(b) program. Currently, Minnesotans who qualify for SSI 1619(b) can earn at least \$51,132 per year and keep their Medical Assistance. (Those with high health care expenses could earn more.)

If you are working and receive an SSI check, you need to count your earnings differently than if you work and receive an SSDI check. If you get both SSI and SSDI you will have to follow the rules for both benefits. Call the Connection for more information.

For more information, contact the Work Incentives Connection:
651-632-5113 or 1-800-976-6728 (or MN Relay-711).

— Keep this page for reference. —



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Send your request via:

Phone: 651-632-5113 or 1-800-976-6728 (or MN Relay - 711) **Fax:** 651-632-5121

Online: www.mnworkincentives.com

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