

Monthly Earnings Estimator

Goals and Objectives

- ✓ Describe how Social Security considers earnings.
- ✓ Identify three resources in addition to the Monthly Earnings Estimator that will help you with payments
- ✓ Demonstrate the use of the Monthly Earnings Estimator to calculate possible eligible earnings months.
- ✓ Choose to use the Estimator in conjunction with other factors to properly submit payment requests.

SSI and SSDI Earnings

Earnings are calculated depending on entitlement program

- Supplemental Security Income (SSI)/T16 – Pay date
- Social Security Disability Insurance (SSDI)/T2 – Earned during the month, i.e. from the 1st day of month to the last day of the month, regardless of when the beneficiary is actually paid
- Concurrent (SSI and SSDI) – Both pay date and pay periods. OSM will use eligible earnings for payment.

Scenario – John, SSDI Beneficiary

- Gross Earnings 01/10 – 01/23 = \$500.00 paid 01/28
- Gross Earnings 01/24 – 02/06 = \$700.00 paid 02/11

Calculated by Pay Period Beginning and Ending Dates

Prorating 2nd gross earnings for January: \$700.00 (amount of overlapping gross earnings) divided by 14 (total days in pay period) $\$50 \times 8$ (days from 01/24 to 01/31) = \$400.

Total January Earnings \$500 (gross earnings #1) + \$400 (8 days from gross earnings #2) = \$900



Scenario – Jim, SSI Beneficiary

- Gross Earnings 01/10 – 01/23 = \$500.00 paid 01/28
- Gross Earnings 01/24 – 02/06 = \$700.00 paid 02/11

Calculated by pay date

Only one pay date in January on 01/28 for \$500

Total January Earnings = \$500



Progress Check One

*Joe Smith is a concurrent beneficiary
month's paycheck is \$923.00*

- Pay date: June 1, 2013
- Pay Period: May 17 – May 30, 2013

If the EN submits a payment request for May, which entitlement program applies?

- A. SSI/T16
- B. SSDI/T2
- C. Both

Website Location



TTW / Home



Becoming an Employment Network

Is your organization interested in becoming an Employment Network? The Self Assessment Tool in the Information Center can help you decide whether the program is a match for your organization. If you already know the Ticket program is right for you, complete the Request for Quotation (RFQ) today!



Only 28 days left to complete the APOR!

News

Announcement: Annual Performance Outcome Report (APOR) Available for Completion

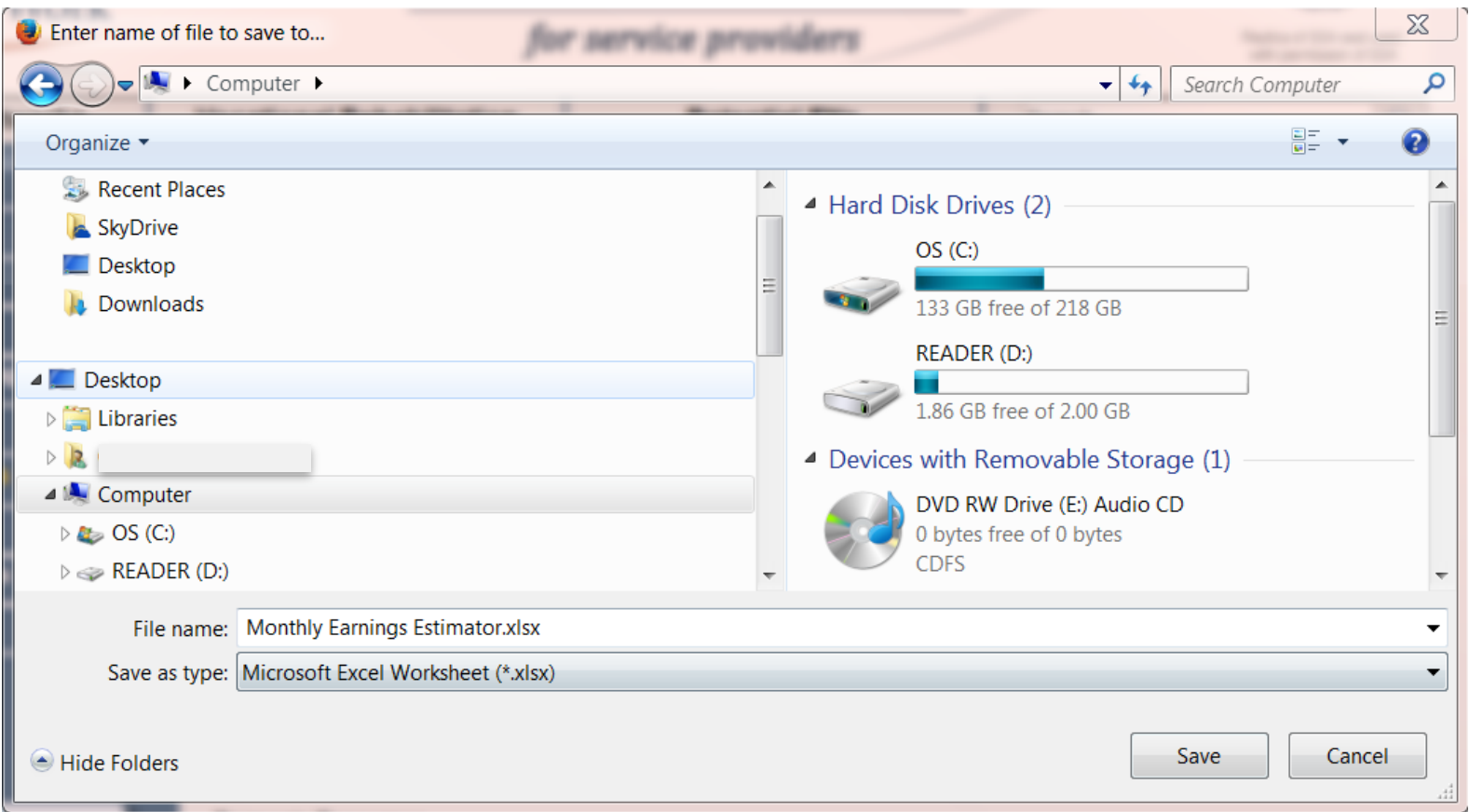
01/28/2015 05:00 PM EST

Welcome to *YourTicketToWork.com!*

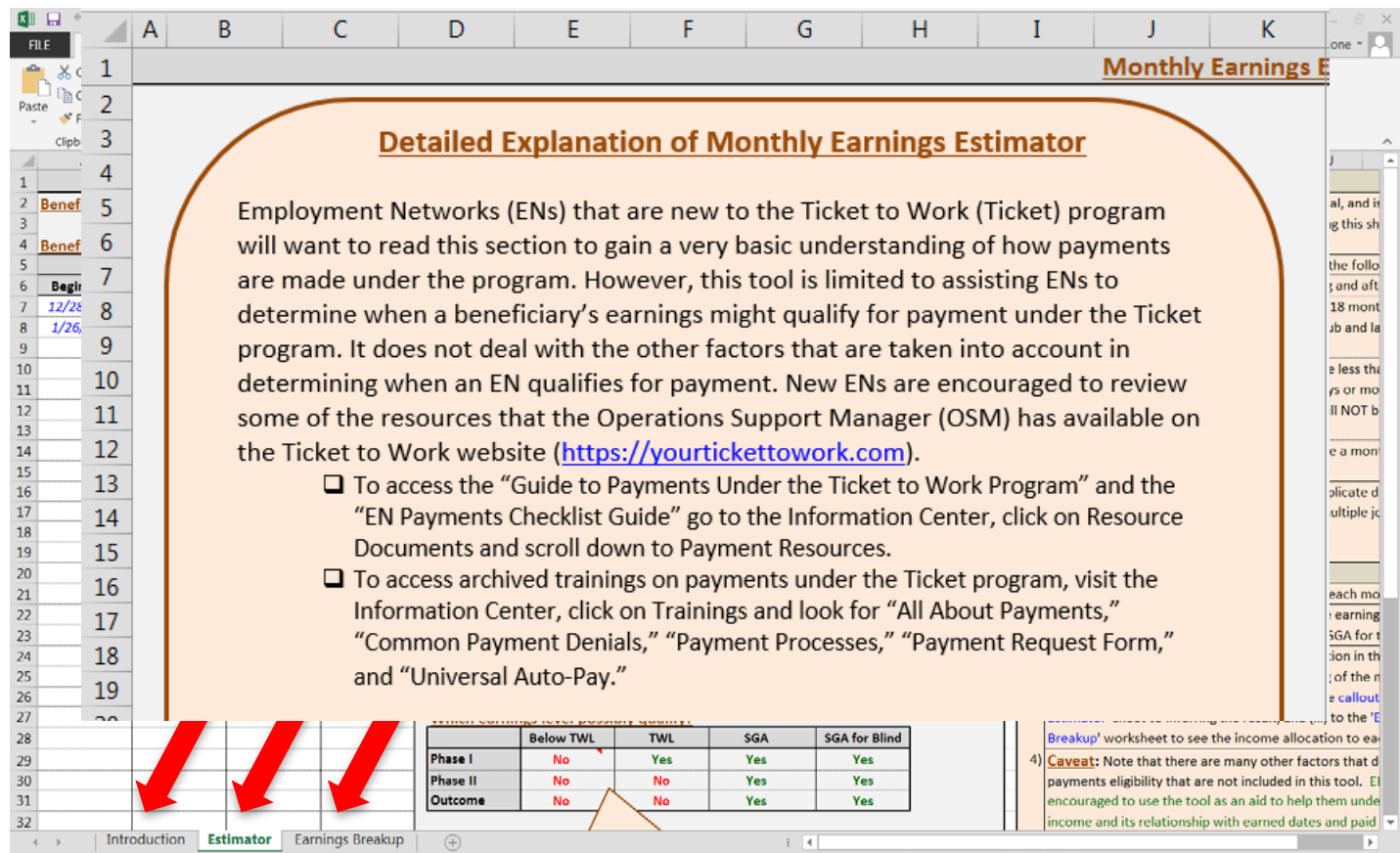
Welcome to the new *YourTicketToWork.com*, the website for Employment Networks and State Vocational Rehabilitation agencies participating in the Social Security Administration's Ticket to Work and Self Sufficiency Program. Check the website frequently for upcoming events and Ticket to Work updates.

This website is designed to educate new and potential service providers about the program and to aid current service providers as they work with beneficiaries, submit for payments under the program and integrate Ticket to Work into their overall business model.

Save the Estimator



Introduction Tab



Detailed Explanation of Monthly Earnings Estimator

Employment Networks (ENs) that are new to the Ticket to Work (Ticket) program will want to read this section to gain a very basic understanding of how payments are made under the program. However, this tool is limited to assisting ENs to determine when a beneficiary's earnings might qualify for payment under the Ticket program. It does not deal with the other factors that are taken into account in determining when an EN qualifies for payment. New ENs are encouraged to review some of the resources that the Operations Support Manager (OSM) has available on the Ticket to Work website (<https://yourtickettowork.com>).

- To access the "Guide to Payments Under the Ticket to Work Program" and the "EN Payments Checklist Guide" go to the Information Center, click on Resource Documents and scroll down to Payment Resources.
- To access archived trainings on payments under the Ticket program, visit the Information Center, click on Trainings and look for "All About Payments," "Common Payment Denials," "Payment Processes," "Payment Request Form," and "Universal Auto-Pay."

	Below TWL	TWL	SGA	SGA for Blind
Phase I	No	Yes	Yes	Yes
Phase II	No	No	Yes	Yes
Outcome	No	No	Yes	Yes

4) **Caveat:** Note that there are many other factors that determine payments eligibility that are not included in this tool. ENs are encouraged to use the tool as an aid to help them understand income and its relationship with earned dates and paid

Introduction Tab - Resources

Resource Documents

- Guide to Payments under the Ticket to Work Program
- EN Payments Checklist Guide

Training

- All About Payments
- Common Payments Denials
- Payment Processes
- Payment Request Form
- Universal Auto-Pay

Introduction Tab - Factors

Background Information for the Monthly Earnings Estimator

The Ticket to Work is an outcome-based program that offers approved services providers, i.e., Employment Networks (ENs) and State Vocational Rehabilitation (VR) agencies functioning as ENs, financial compensation when they successfully assist individuals receiving Social Security Disability insurance (SSDI) and Supplemental Security Income (SSI) to enter, maintain and advance in employment. Payments are made to an EN with the Ticket assignment when the beneficiary achieves prescribed levels of work and earnings that indicate movement towards increased economic independence. Four criteria are used at different points in the payment process to determine when a payment will be made:

- 1) How long the person has worked;
- 2) Whether the person's gross earnings are below, at or above the amount that Social Security designates as Trial Work Level (TWL) earnings;
- 3) Whether the person's gross earnings are at or above the monthly amount Social Security designated as Substantial Gainful Activity (SGA).
- 4) Whether or not the person's monthly gross earnings are above SGA and his/her benefits have been suspended due to work and earnings. Social Security has established two different earnings amounts for SGA based on two categories of disabilities, i.e., beneficiaries who are blind or visually impaired (Blind SGA) and beneficiaries with disabilities other than blindness (SGA).

Introduction Tab – TWL and SGA Tables

Since Social Security is authorized to change the earnings amounts designated as TWL and SGA level earnings on an annual basis, ENs need to know these annual designations. This information is available online at (and is also listed in the 'Earnings Breakup' worksheet for the period 2008-2014):

- <http://www.socialsecurity.gov/OACT/COLA/twp.html> for TWL, and
- <http://www.socialsecurity.gov/OACT/COLA/sga.html> for SGA.

Estimator Tab

The screenshot displays an Excel spreadsheet with the following structure:

- Columns:** A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z.
- Rows:**
 - Row 1: **Beneficiary** (colored header)
 - Row 2: **Beneficiary OR** (colored header)
 - Row 3: **Pay** (colored header)
 - Row 4: **Begin Date** (colored header)
 - Row 5: **SSDI/ Title 2 (Based on when Earned)** and **SSI/ Title 16 (Based on when Paid)** (colored headers)
 - Row 6: Data row with dashes in the SSDI and SSI columns.
 - Rows 7-12: Additional data rows with dashes.
- Instruction Panel (Column A, Rows 5-12):**

Instructions for filling in the form

 - Enter beneficiary SSN and name. This is optional, and is for your reference only, in case you are saving or printing this sheet. The tool doesn't make use of this information.
 - Enter beneficiary's pay stub data. Please note the following:
 - a) The tool will only accept earnings including and after 2008
 - b) The calendar window should be limited to 18 months (i.e., the difference between the earliest pay stub and latest pay stub should be a maximum of 18 months).
 - c) A single pay stub duration is expected to be less than or equal to 31 days. Pay slips spanning 32 days or more, or rolling over 3 calendar months or more, will NOT be accepted.
 - d) It will accept daily, weekly, bi-weekly, twice a month, and monthly pay slips.
 - You may enter pay slips with overlapping or duplicate date ranges, to allow for beneficiaries working on multiple jobs.

Progress Check Two

Where would you begin inputting pay stub information?



The screenshot shows an Excel spreadsheet titled "Monthly Earnings Estimator.xlsx". The interface includes a ribbon with tabs like FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, and VIEW. Below the ribbon, there are input fields for "Beneficiary SSN:" (value: 999 99 9999) and "Beneficiary Name:" (value: John Doe). To the right of these fields is a yellow tooltip that says "Pay Period Begin Date Enter Pay Period begin date in mm/dd/yyyy format (accepts any date starting from 2008)".

MONTHLY EARNINGS ESTIMATOR				
Pay Period	Possible Claim Months	SSDI/ Title 2 (Based on when Earned)	SSI/ Title 16 (Based on when Paid)	
Begin Date	End Date	Paid Date	Gross Earnings	
12/28/2008	1/25/2009	2/4/2009	\$1,300.00	
1/26/2009	2/23/2009	3/5/2009	\$1,300.00	
	Dec - 2008	\$179.31	Below TWL	-
	Jan - 2009	\$1,389.66	SGA	-
	Feb - 2009	\$1,031.03	SGA	\$1,300.00
	Mar - 2009	-	-	\$1,300.00
				SGA

On the right side of the spreadsheet, there are sections for instructions and a description of the tool's function.

A Instructions for filling in the form

- 1) Enter beneficiary SSN and name. This is optional, and is reference only, in case you are saving or printing this sheet. The tool doesn't make use of this information.
- 2) Enter beneficiary's pay stub data. Please note the following:
 - a) The tool will only accept earnings including and after January 2009.
 - b) The calendar window should be limited to 18 months from the date of the earliest pay stub and the latest pay stub should be a maximum of 18 months.
 - c) A single pay stub duration is expected to be less than or equal to 31 days. Pay slips spanning 32 days or more, including rolling over 3 calendar months or more, will NOT be accepted.
 - d) The tool will accept daily, weekly, bi-weekly, twice a month, or monthly pay slips.
- 3) You may enter pay slips with overlapping or duplicate date ranges, to allow for beneficiaries working on multiple jobs.

B What does the tool do?

- 1) Calculates total income 'earned' and 'paid' for each month.
- 2) Maps the resulting monthly amount against the earnings threshold that Social Security designates as TWL, SGA or SGA for each month.
- 3) Please refer to (i) the 'Computing Earnings' section in the 'Introduction' sheet, for a better understanding of the tool's calculation.



Enter ALL Pay Stub Information

STUB SAMPLES INC. 4891 INGLESIDE DRIVE HUNTINGTON BEACH CA 92649				Earnings Statement		
EMPLOYEE NO.	EMPLOYEE NAME		SOCIAL SECURITY NO	PERIOD BEG.	PERIOD END	CHECK DATE
045345	JOHN J. DOE		xxx-xx-9898	01/18/2011	02/01/2011	02/04/2011
EARNINGS	HOURS	RATE	CURRENT AMOUNT	WITHOLDINGS/DEDUCTIONS	CURRENT AMOUNT	YEAR TO DATE
REGULAR PAY	87.60		2307.69	STATE TAX AMT DEFERRED CMP FED TAX AMT HI TAX OASDI	87.69 0.00 281.54 33.46 96.92	350.77 0.00 1126.15 133.85 387.69
CURRENT AMOUNT	CURRENT DEDUCTIONS	NET PAY	YTD EARNINGS	YTD DEDUCTIONS	YTD NET PAY	CHECK NO.
2307.69	499.62	1808.08	9230.77	1998.46	7232.31	48974

Entitlement Program Schedule

SSDI (title II)	SSI (title XVI)	Concurrent
<ul style="list-style-type: none"><li data-bbox="117 725 587 1006">• Benefits payments on the 3rd of the month or later	<ul style="list-style-type: none"><li data-bbox="687 725 1130 1006">• Benefits payments on the 1st of the month	<ul style="list-style-type: none"><li data-bbox="1257 725 1812 1082">• Benefits payments on the 1st of the month and 3rd of the month or later

Entering Data in the Estimator

MONTHLY EARNINGS ESTIMATOR								
Beneficiary		Beneficiary SSN:	987-65-4321					
		Beneficiary Name:	Tom Ticketholder					
Beneficiary Earnings Details								
Pay Period		Paid Date	Gross Earnings	Possible Claim Months 09/2011 - 10/2011	SSDI/ Title 2 (Based on when Earned)		SSI/ Title 16 (Based on when Paid)	
Begin Date	End Date				ERRORS			
9/24/2011	10/2/2011	10/6/2011	\$819.50	Sep - 2011	\$637.39	Below TWL	-	
				Oct - 2011	\$182.11	Below TWL	\$819.50	TWL

Entering Data in the Estimator (part two)

MONTHLY EARNINGS ESTIMATOR								
Beneficiary		Beneficiary SSN:		987-65-4321		ERRORS		
		Beneficiary Name:		Tom Ticketholder				
Beneficiary Earnings Details								
Pay Period		Paid Date	Gross Earnings	Possible Claim Months 09/2011 - 10/2011	SSDI/ Title 2 (Based on when Earned)		SSI/ Title 16 (Based on when Paid)	
Begin Date	End Date				Sep - 2011	Oct - 2011		
9/24/2011	10/2/2011	10/6/2011	\$819.50	\$637.39	Below TWL	-		
10/3/2011	10/16/2011	10/20/2011	\$838.75	\$1,020.86	SGA	\$1,658.25	SGA for Blind	
				-		-		

Entering Data in the Estimator (part three)

				MONTHLY EARNINGS ESTIMATOR				
Beneficiary		Beneficiary SSN:		987-65-4321		ERRORS		
		Beneficiary Name:		Tom Ticketholder				
Beneficiary Earnings Details								
Pay Period		Paid Date	Gross Earnings	Possible Claim Months 09/2011 - 11/2011	SSDI/ Title 2 (Based on when Earned)		SSI/ Title 16 (Based on when Paid)	
Begin Date	End Date				Sep - 2011	Oct - 2011	Nov - 2011	-
9/24/2011	10/2/2011	10/6/2011	\$819.50		\$637.39	Below TWL	-	
10/3/2011	10/16/2011	10/20/2011	\$838.75		\$1,837.61	SGA for Blind	\$816.75	TWL
10/17/2011	10/30/2011	11/3/2011	\$816.75		-		-	
					-		-	

Entering Data in the Estimator (part four)

MONTHLY EARNINGS ESTIMATOR										
Beneficiary		Beneficiary SSN:		987-65-4321		ERRORS				
		Beneficiary Name:		Tom Ticketholder						
Beneficiary Earnings Details										
Pay Period		Paid Date	Gross Earnings	Possible Claim Months		SSDI/ Title 2		SSI/ Title 16		
Begin Date	End Date			09/2011 - 11/2011	(Based on when Earned)	(Based on when Paid)				
9/24/2011	10/2/2011	10/6/2011	\$819.50	Sep - 2011	\$637.39	Below TWL	-			
10/3/2011	10/16/2011	10/20/2011	\$838.75	Oct - 2011	\$1,896.15	SGA for Blind	\$1,658.25	SGA for Blind		
10/17/2011	10/30/2011	11/3/2011	\$816.75	Nov - 2011	\$760.96	TWL	\$1,636.25	SGA		
10/31/2011	11/13/2011	11/17/2011	\$819.50	-	-		-			
				-	-		-			

Entering Data in the Estimator (part five)

				MONTHLY EARNINGS ESTIMATOR				
Beneficiary		Beneficiary SSN:		987-65-4321		ERRORS		
		Beneficiary Name:		Tom Ticketholder				
Beneficiary Earnings Details								
Pay Period		Paid Date	Gross Earnings	Possible Claim Months 09/2011 - 12/2011	SSDI/ Title 2 (Based on when Earned)		SSI/ Title 16 (Based on when Paid)	
Begin Date	End Date				Sep - 2011	Oct - 2011	Nov - 2011	Dec - 2011
9/24/2011	10/2/2011	10/6/2011	\$819.50	Sep - 2011	\$637.39	Below TWL	-	-
10/3/2011	10/16/2011	10/20/2011	\$838.75	Oct - 2011	\$1,896.15	SGA for Blind	\$1,658.25	SGA for Blind
10/17/2011	10/30/2011	11/3/2011	\$816.75	Nov - 2011	\$1,580.46	SGA	\$1,636.25	SGA
10/31/2011	11/13/2011	11/17/2011	\$819.50	Dec - 2011	-	-	\$819.50	TWL
11/14/2011	11/27/2011	12/1/2011	\$819.50	-	-	-	-	-
				-	-	-	-	-
				-	-	-	-	-

Entering Data in the Estimator (part six)

MONTHLY EARNINGS ESTIMATOR									
Beneficiary		Beneficiary SSN:		987-65-4321		ERRORS			
		Beneficiary Name:		Tom Ticketholder					
Beneficiary Earnings Details									
Pay Period		Paid Date	Gross Earnings	Possible Claim Months		SSDI/ Title 2		SSI/ Title 16	
Begin Date	End Date			09/2011 - 12/2011	(Based on when Earned)	(Based on when Paid)			
9/24/2011	10/2/2011	10/6/2011	\$819.50	Sep - 2011	\$637.39	Below TWL	-		
10/3/2011	10/16/2011	10/20/2011	\$838.75	Oct - 2011	\$1,896.15	SGA for Blind	\$1,658.25	SGA for Blind	
10/17/2011	10/30/2011	11/3/2011	\$816.75	Nov - 2011	\$1,709.78	SGA for Blind	\$1,636.25	SGA	
10/31/2011	11/13/2011	11/17/2011	\$819.50	Dec - 2011	-		\$948.82	TWL	
11/14/2011	11/27/2011	12/1/2011	\$819.50	-	-		-		
11/2/2011	11/4/2011	12/2/2011	\$129.32	-	-		-		
				-	-		-		
				-	-		-		
				-	-		-		

Estimator with Data Entered

MONTHLY EARNINGS ESTIMATOR				
987-65-4321		ERRORS		
Tom Ticketholder				
Possible Claim Months 09/2011 - 12/2011	SSDI/ Title 2 (Based on when Earned)			
Sep - 2011	\$637.39	Below TWL	-	
Oct - 2011	\$1,896.15	SGA for Blind	\$1,658.25	SGA for Blind
Nov - 2011	\$1,709.78	SGA for Blind	\$1,636.25	SGA
Dec - 2011	-		\$948.82	TWL
-	-		-	
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	\$4,243.32		\$4,243.32	

Earnings Breakup Tab

PAYSLIP INFORMATION							
Begin Date	End Date	Paid Date	Gross	09/2011	10/2011	11/2011	12/2011
24-Sep-11	2-Oct-11	6-Oct-11	\$819.50	-	\$819.50	-	-
3-Oct-11	16-Oct-11	20-Oct-11	\$838.75	-	\$838.75	-	-
17-Oct-11	30-Oct-11	3-Nov-11	\$816.75	-	-	\$816.75	-
31-Oct-11	13-Nov-11	17-Nov-11	\$819.50	-	-	\$819.50	-
14-Nov-11	27-Nov-11	1-Dec-11	\$819.50	-	-	-	\$819.50
2-Nov-11	4-Nov-11	2-Dec-11	\$129.32	-	-	-	\$129.32

INCOME THRESHOLD FOR PAYMENT ELIGIBILITY				
Year	Below TWL	TWL	SGA	SGA for Blind
2008		\$670.00	\$940.00	\$1,570.00
2009		\$700.00	\$980.00	\$1,640.00
2010		\$720.00	\$1,000.00	\$1,640.00
2011		\$720.00	\$1,000.00	\$1,640.00
2012		\$720.00	\$1,010.00	\$1,690.00
2013		\$750.00	\$1,040.00	\$1,740.00
2014		\$770.00	\$1,070.00	\$1,800.00
2015		\$780.00	\$1,090.00	\$1,820.00

Save the Monthly Earnings Estimator



TT4321_02202014_CJM.xlsx - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Clipboard Font Alignment Number Styles Cells

MONTHLY EARNINGS ESTIMATOR									
Beneficiary		Beneficiary SSN:		987-65-4321		ERRORS			
		Beneficiary Name:		Tom Ticketholder					
Beneficiary Earnings Details									
Pay Period		Paid Date	Gross Earnings	Possible Claim Months		SSDI/ Title 2		SSI/ Title 16	
Begin Date	End Date			09/2011 - 12/2011	(Based on when Earned)	(Based on when Paid)			
9/24/2011	10/2/2011	10/6/2011	\$819.50	Sep - 2011	\$637.39	Below TWL	-		
10/3/2011	10/16/2011	10/20/2011	\$838.75	Oct - 2011	\$1,896.15	SGA for Blind	\$1,658.25	SGA for Blind	
10/17/2011	10/30/2011	11/3/2011	\$816.75	Nov - 2011	\$1,709.78	SGA for Blind	\$1,636.25	SGA	
10/31/2011	11/13/2011	11/17/2011	\$819.50	Dec - 2011	-		\$948.82	TWL	
11/14/2011	11/27/2011	12/1/2011	\$819.50	-	-		-		
11/2/2011	11/4/2011	12/2/2011	\$129.32	-	-		-		
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Pay Period Begin Date
Enter Pay Period begin date in mm/dd/yyyy format (accepts any date starting from 2008)

Progress Check Three

The estimator is one tool that is used to calculate eligible beneficiary earnings to ENs. What are some other resources and factors that need to be considered to submit a payment request?

- 1
- 2
- 3

Checks and Balances



Employment Network - Stacy



TPM Payment Help Desk - Gail

Questions?

