ILR School

K. Lisa Yang and Hock E. Tan Institute on Employment and Disability

NOSCR NATIONAL ORGANIZATION of SOCIAL SECURITY CLAIMANTS' REPRESENTATIVES

Title II Return-to-Work Checklist

Before closing a successful SSDI case, use this checklist to explain key information to the client and give them the "Returning to Work When You Are Ready" handout.

Return-to-Work

- ☐ Ticket to Work can help individuals aged 18–64 at no cost:
  - SSA cannot start a medical CDR while an individual is using Ticket to Work.
  - Employment Networks and State VR agencies offer free employment services.
- ☐ 9-month Trial Work Period (TWP):
  - During the TWP, you keep your full SSDI payment.
  - TWP months do not have to be consecutive.
  - Only months when you work and earn more than the TWP amount count.
- ☐ 36-month Re-entitlement Period starts immediately after the TWP:
  - Your SSDI payments continue when your countable income is not above the Substantial Gainful Activity (SGA) level.
  - Even if payments stop due to SGA-level work, you can get SSDI payments back if your income drops below SGA during these 36 consecutive months.
- ☐ 60-month window to get back on Title II if terminated:
  - Even if SSDI payments have been terminated due to SGA-level work after the Re-entitlement Period, you can request Expedited Reinstatement within 60 months.
  - If you make this request, you can receive provisional payments during the medical improvement review period.
- ☐ After the TWP, you keep Medicare for at least 93 months:
  - If your SSDI payments stopped due to wages, you keep premium-free Part A.
  - Your coverage lasts for at least 93 months after the TWP.
- ☐ Talk with a benefits planner for details: To find free help from a benefits planner, use the "Returning to Work When You Are Ready" handout. The planner can give you a customized analysis of how work will impact every public benefit you receive.

Reporting Requirements

- ☐ Report any address change.
- ☐ Report wages and self-employment income every month.
- ☐ Report marriage only if you are receiving Childhood Disability Benefits.

Overpayments

- ☐ If Social Security is wrong about the overpayment, you can appeal: ssa.gov/forms/ssa-561.pdf
- ☐ If the overpayment was not your fault, you can request a waiver: ssa.gov/forms/ssa-632-bk.pdf
- ☐ You can request a reasonable repayment agreement: ssa.gov/forms/ssa-634.pdf

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