

Special Conditions

Fact Sheet 2021

What does Social Security consider when you receive SSDI and work?

When a Social Security Disability Insurance (SSDI) beneficiary works and has completed their Trial Work Period (TWP), Social Security will compare their gross monthly earnings (before taxes) and work pattern, to a monthly threshold referred to as Substantial Gainful Activity (SGA). In 2021, that amount is \$1,310 or \$2,190 if you are blind. The SGA amount usually changes annually. This is how it generally works: If you gross at or above SGA, you will *not* be entitled to your SSDI payment for that month, however, if you gross *below* SGA, you will be entitled to your SSDI payment.

What are Special Conditions?

Special Conditions are work incentives that Social Security can use when determining if a person is performing SGA. They are a type of subsidy where work-related items and/or services are paid for by a third party, *not* by the employer or the individual. They are not provided to other employees in the same position.

How can Special Conditions help me?

The value of these items and/or services are deducted from your gross monthly earnings, possibly making you eligible for an SSDI payment, even though you are earning over SGA.

Who can qualify for Special Conditions?

An SSDI beneficiary who receives on-the-job support, such as job coaching, specialized transportation, and/or adaptive equipment paid by a state agency, would likely qualify.

When can Special Conditions be used?

Special Conditions can only be used once you have completed your TWP and earn SGA.

How are Special Conditions approved?

In order to obtain approval, an individual and their employer must complete the Employee Work Activity Questionnaire (*Form SSA-3033*) to help Social Security determine the nature and value of the Special Condition. A link to this form can be found at www.ssa.gov/forms/ssa-3033.pdf.

Note: Social Security reviews Special Conditions every year.

How is the value of Special Conditions determined?

The dollar value is calculated by multiplying the *individual's* hourly pay rate, by the number of hours the Special Condition is used by the individual. Again, if the value of the Special Condition reduces the individual's new countable gross monthly earnings below SGA, then the individual will be entitled to their cash benefit for that month.

Special Condition Example:

Christine works and grosses \$1,350 a month. She receives job-coaching support for 10 hours each month, which is paid by the Massachusetts Rehabilitation Commission. Since this support is provided by a third-party, it can be considered a Special Condition. The value of the Special Condition equals *Christine's* hourly rate multiplied by the number of hours she is coached each month. This equals \$135.00 (\$13.50 X 10 hours). This amount is deducted from her gross monthly earnings of \$1,350, which brings her countable income to \$1,215. Her countable earnings are now below SGA; therefore, she is entitled to her SSDI payment for that month.

A Community Work Incentives Coordinator can help you understand the process of Special Conditions and the impact of work on your SSDI benefits.

For more information about **Work Without Limits Benefits Counseling** contact

1-877-YES-WORK (1-877-937-9675) or visit <http://www.workwithoutlimits.org/benefits-counseling/>