

# WIN News

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## Student Earned Income Exclusion

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The Student Earned Income Exclusion (SEIE) is an easily utilized work incentive available for Social Security beneficiaries ages 14 to 22. A working student in 2015 can deduct earnings up to \$1,780 a month for a maximum yearly limit of \$7,180 and not have it impact their federal benefits.

The SEIE is available to any working student in grade 7 or above and under age 22 whose income affects an SSI payment. Prior to 2005, this work incentive was known as the Student Child Earned Income Exclusion and wasn't available if the working student was a head of household or married. That restriction no longer applies. A beneficiary can be married or head of household and still access the SEIE.

If you are a Supplemental Security Income (SSI) recipient under age 22, are working and regularly attending school, you qualify for this work incentive.

The SSI resource limit of \$2,000 for a single person or \$3,000 for a couple still applies. It is important to have a plan in place to utilize any funds that might exceed the resource limit if retention of SSI benefits and Medicaid is an issue. Examples are paying tuition costs or setting money aside in an IDA or PASS Plan.

Certified Benefits Planners can help beneficiaries access this work incentive.

Additional information is available in this fact sheet [SEIE 2015 Fact Sheet](#) or at the SSA website:

<http://www.socialsecurity.gov/ssi/spotlights/spot-student-earned-income.htm>

## Question and Answer Corner

*Gene Rada and Paula Fitch, WIN Project Managers*

Welcome to the WIN Question and Answer Corner of the WIN Newsletter. Please send your questions or concerns about benefits and employment to [WINrefer@state.or.us](mailto:WINrefer@state.or.us) and title them QUESTION.

**Question:** What is the definition of regularly attending school for the Student Earned Income Exclusion (SEIE)? What is the minimum number of credit hours needed to utilize the deduction?

**Answer:** Regularly attending school means that you are taking at least 8 hours a week in a college or university; 12 hours a week in 7th-12th grades or a training course (15 hours if it involves shop practice); or for less time listed for reasons beyond the student's control, such as illness. Home school is 12 hours a week for grades 7-12 and the instruction is in accordance with home school law of the state where the student resides.

**Question:** If a student does not attend school in the summer and they work a summer job does SEIE apply? Can they still utilize SEIE if they work in the summer and don't attend school?

**Answer:** Yes, a student can work during the summer and not attend school, but they must be planning on returning to school in the fall. If their plans change, they must report the change to SSA and they may no longer be eligible for SEIE's deduction.

## Success Story

This success story started making the rounds of the Work Incentive Network system and the Vocational Rehabilitation offices last month, so you may have seen it before. We believe it’s worth seeing again.

The story is at least a triple success story. First Katie Aljets now has a job that’s a perfect fit for her, second, her employer, the High Desert Educational Services District (ESD) now has an employee that’s a perfect fit for them, and third, because it’s the result of a successful collaboration between a participant and the partners who serve her.

Katie’s employment team included Courtney Gibson, a Vocational Rehabilitation Counselor in Bend, Jill Hannemann, a Work Incentive Coordinator at Abilitree in Bend, and Jenelle Eager, an Employment Specialist from Good-2-Go Oregon, who is also Katie’s job coach

The collaboration and partnership efforts resulted in Katie obtaining a job as a secretarial assistant for the High Desert ESD, working specifically with the Redmond School District. The story says about the only the difference between Katie and her co-workers is that she works shorter days.

Jill Hannemann had this to say about working with Katie, *“My interaction with Katie, her family and VR was a pleasure, as well as exciting, to watch her make progress with her employment. I have no doubt that Katie will succeed in whatever she puts her mind to.”*

So far Katie is utilizing the General Income Exclusion (\$20), the Earned Income Exclusion (\$65) and the 50% countable income deduction work incentives which are available to most people who are receiving Supplemental Security Income (SSI) and working.

Katie’s story is at <http://mywindowco.com/shes-one-person-loves-mondays/>. It’s titled “She’s one of the few people who loves Mondays...” and originally aired on KBNZ Weekdays in Bend.

## Training Schedule

### Understanding SSA Benefits and Employment

The training is from 8:30 am to 4:30 pm. Dates and locations are below. Lunch is not provided ,

**Salem**  
Held March 12

**La Grande**  
June 9, Center for Human Development, 2301 Cove Ave., Conference Room

**Medford**  
Sept. 17, Self-Sufficiency Office, 800 Cardley St., Large Conference Room

**Portland**  
Nov. 5, Portland State Office Building, 800 NE Oregon St., Room 1B

Pre-registration is required through the DHS Learning Center at <https://dhslearn.hr.state.or.us>. The course is C04631. For accommodation needs, please contact Paula Fitch at [paula.fitch@state.or.us](mailto:paula.fitch@state.or.us) or 503-947-5469

**OELN Social Security Benefits and Work Incentives** next training will April 21-22 in Medford. Click [here](#) for additional information and registration or go to <http://www.employment-first.org/>.

### WIN Tip of the Month

Social Security Administration (SSA) has posted the 2015 Redbook at <http://www.socialsecurity.gov/redbook/>.

The Redbook contains a general description of SSA’s disability-related policies and is a general reference tool and a self-help guide for applicants and for beneficiaries who are interested in working.

SSA’s Redbook is free and can be downloaded from the website above or can be ordered to be delivered by mail.