

DI 13010.020 Work Reports and Receipts

A. Description of a work report

A work report is a report of a change in work activity or earnings for a beneficiary receiving title II or title XVI disability benefits. We receive work reports by phone, fax, mail, or in person.

The report may include documentation of earnings, such as:

- pay stubs,
- a W2,
- a tax return, or
- a written or verbal statement that work activity has started, stopped, or changed in some way (i.e., a reduction, or increase in pay or hours).

B. Explaining reporting responsibilities

Take every opportunity to tell beneficiaries or their representative payees to promptly report any changes in work activity. Remind them that work activity and earnings may affect benefits, and they must tell us right away if:

- work starts or stops;
- duties, hours, or pay changes; or
- they stop paying for items or services needed for work due to the disability.

Remind title XVI and concurrent beneficiaries, deemors, and representative payees to report monthly earnings as soon as possible. For more information on SSI monthly wage reporting, see [SI 00820.143](#).

See also:

[DI 10505.005](#) Determining and Verifying Gross Earnings from Employment

C. Receipts for work reports

1. Mandatory issuance of receipts for reports of a change in work activity or earnings

[Section 202 of the Social Security Act of 2004](#) requires us to issue a receipt when we receive a report of a change in work activity or earnings status from a disabled

beneficiary, or their representative. The receipt acknowledges that the beneficiary (or representative) gave us information about a change in his or her work or earnings, and documents the date that we received the report.

If you receive a work report from one of the following	Then send the receipt to one of the following:
<ul style="list-style-type: none"> • beneficiary; • representative payee; • appointed representative; or • title XVI deemor. 	<ul style="list-style-type: none"> • beneficiary; • representative payee; or • appointed representative.

To establish a work report in the appropriate system and issue a receipt follow the instructions in this section. For in-person and telephone reports from the beneficiary or payee, give or mail the receipt to the reporter immediately. For mailed or faxed reports, or reports dropped off in the field office (FO), establish the work report and mail the receipt within five days of receipt of the information.

If eWork is unavailable, or the case is an Supplemental Security Income (SSI) Monthly Wage Verification (SSIMWV) exclusion, issue a SSA-724 (Work Report Receipt) to the reporter through the Document Processing System (DPS). For more information on the DPS, go to the [Boston Regional Site](#).

See also:

- [GN 03910.020](#) Who Is a Representative
- [SI 01320.001](#) Deeming of Income-Background
- [SI 00820.143](#) Monthly Wage Reporting

2. When receipts are not mandatory

Receipts are not mandatory when one of the following happens:

- you receive a report from someone other than the beneficiary, payee, appointed representative, or deemor (for example, a sheltered workshop that reports the income of all employees);
- the monthly reported earnings are less than \$65 for a title XVI beneficiary who consistently earns less than the \$65 earned income exclusion; or

- you receive a SSA-821-BK or SSA-820-BK (Work Activity Report) in response to a work review established in eWork resulting from a CDREO alert; or
- you receive work information from a CDR mailer, and the work has already been developed.

If a third party requests a receipt (e.g., deemor), inform him or her that you will mail the receipt to the beneficiary or the representative payee. Do not issue a receipt directly to the reporter because the receipt contains the beneficiary's personally identifiable information (PII).

D. Establishing a work report in eWork

Establish a work report in eWork when you receive information that work and earnings has started, stopped, or changed for a title II or title XVI beneficiary who receives benefits based on disability.

From the eWork main menu:

1. Select Initiate/Update Work Report.
2. Review the Development Summary block. If there is a pending work review, go to [DI 13010.020F](#) in this section.
3. Review the list of employers. If the work report is from an employer already listed, select "Add" beside the employer to update the work activity information.
CAUTION: Do not select "Edit" or this will bring in prior work reports showing the earlier initiation date for the same employer.
4. If eWork does not list the employer, select "New Employer" at the bottom of the list.
5. Complete the Employment Input Screen with as much information as the beneficiary can provide about the work activity. Select "Submit and Close."
6. For title XVI and concurrent cases, the "PushT16WrkRpt" screen appears next. Complete the screen with the additional information requested, and to establish a modernized development worksheet (MDW) or development worksheet (DWO1) issue, select one of the following:
 - "READY": Send to PCOM"
 - "SKIP": No MDW, or MSSICCS input needed

You cannot enter a work report for a title XVI deemor into eWork. If a title XVI deemor is reporting his or her own monthly earnings, follow [SI 00820.143](#).

Use SSI Monthly Wage Verification (SSIMWV) to record the deemor's wages and issue a receipt to the beneficiary or the beneficiary's representative payee as appropriate.

If the title XVI deemor reports that he or she will soon start working and does not yet have paystubs, or the case is an SSIMWV exclusion, use DPS to issue a SSA-L724 (Work Report Receipt) to the beneficiary or representative payee. For the fill-in information, provide a brief, one sentence summary of the work report information.

E. Work report pending

If a work report for the same employer is pending in eWork:

1. Determine if the current report will change the information from the prior report, or is a report for a new period of employment. If the report:
 - is for a new period of employment, select "Add"; or
 - involves work from the same period of employment that is already shown, select "Edit."
2. Issue a new receipt if the reporter is the beneficiary, the representative payee, or appointed representative.

F. Work review pending

If the Development Summary block shows that a work review is pending, establish the work report. eWork automatically assigns the work report to the office with jurisdiction of the pending work review.

IMPORTANT: If the beneficiary indicates that he or she has moved, or wants your office to handle the work review, contact the office with jurisdiction and ask them to transfer the work review to you. After you transfer jurisdiction in eWork, the system automatically transfers the work review in the disability control file (DCF).

G. Pay stub reports and receipts

When a technician has already established the employer in eWork with a work report, the "Pay Stub Report" feature is only available to input earnings for title II beneficiaries.

The provide controls similar to the work report.

To avoid incorrect payments for both title II and title XVI, make sure you evaluate regular, ongoing pay stub reports for a change that could affect the beneficiary's eligibility to disability.

1. Processing title II pay stub report does not *evaluate the affect* that earnings have on benefits or

e II pay stub reports

If you receive pay stubs from a title II beneficiary, check the Development Worksheet in eWork to determine if there is a pending work review. Take the following actions if:

- There is a pending work review, send the pay stubs to the FO responsible for the work review. If the work review belongs to another jurisdiction, alert them of the pay stub input, and establish a one-day tickle on the developmental worksheet (DW) in eWork; or
- A work review is not pending, click on the “View/Update Pay Stub Report” link from the eWork main menu. If the employer has not been established in the Pay Stub Report listing, return to the eWork main menu to establish a Work Report, and issue a receipt, per [DI 13010.020B](#) in this section. Then input the paystub information.
- If the current employer is present in the Pay Stub Report listing, input the information in the Pay Stub Report input screen.
- Issue a receipt to the reporter if he or she meets the conditions as stated in [DI 13010.020C.1](#) in this section.

IMPORTANT: If you are unable to use eWork, fax the pay stubs into NDRed and issue the SSA-L724 through DPS. Alert the technician who is responsible for evaluating the work activity according to local procedures. If you verified paystubs in eWork, you can return the paystubs to the beneficiary. You do not need to fax the paystubs into eView or NDRed.

2. Processing concurrent monthly pay stub reports

Use the SSIMWV system to record pay stubs for a concurrent regular earnings reporter. For policy on monthly wage reporting, see [SI 00820.143](#). If the paystubs are for a first time report of work or change of work:

- establish a work report in eWork, and
- send the paystubs to the technician who is responsible for evaluating the earnings, following local procedures.

3. Processing pay stubs for concurrent cases that involve work incentives

If the case is in MSSICS, you cannot enter pay stubs for concurrent cases involving blind work expenses (BWEs) or impairment-related work expenses (IRWEs) into the SSIMWV program. To process monthly pay stubs in concurrent cases that involve BWEs or IRWEs, see SI 00820.144. Make sure the person responsible for the title II decision is aware of any IRWEs.

4. Processing title XVI only monthly pay stub reports

To process title XVI only pay stub reports, follow [SI 00820.143](#) and SI 00820.144

It is mandatory to attempt to recruit beneficiaries to report monthly wages via the SSITWR system. For more information on the SSITWR system, see SI 00820.144.