

Social Security/Medicaid Work Incentives

Impairment-Related Work Expense (IRWE)

Allows deductions for out-of-pocket expenses for medical supplies, medicine, medical supplies, service animals, and other medical items.

- May be able to deduct other out-of-pocket expenses for doctor visits, attendant care that prepares the individual for work or attends them while at work
- The expense cannot be deducted anywhere else
- Must relate directly to the individual's disability
- Must be needed in order to work
- Example: Specialized equipment needed to work because of a disability, or cover the cost of an attendant to help the individual get ready for work

Student Earned Income Exclusion

- Students under the age of 22 are allowed to exclude earnings from income
- To claim this exclusion, students must attend:
 - 8 hours per week of college, or
 - 12 hours per week grades 7-12, or
 - 12-15 hours per week of a training course, or
 - 12 hours per week of homebound school with visits from a tutor with the school

Plan To Achieve Self Support (PASS)

Plan to Achieve Self Support (PASS) is a plan to create your own job or business. You may have a PASS if you would be eligible for SSI based on your disability but not for your income and/or assets, or you are already eligible for SSI and have income that reduces the amount of SSI you receive and using a PASS to reach your employment goal will ultimately help to reduce or eliminate benefits received from SSI, Social Security, or both.

The PASS must include:

- The job or business (your work goal)
- The steps you will take and the things you will need in order to achieve your work goal (Examples: education or training, transportation, child care, or assistive technology);
- The money you will use to pay for these things. This may be any income (other than SSI payments) or assets, such as Social Security benefits, wages from a current job, or savings
- A timetable for achieving your goal

If Social Security approves your PASS, it will not count the money spent on the plan when determining eligibility for SSI. If already eligible for SSI, this will increase the SSI payment, replacing all of the money spent on the PASS.

Ticket to Work

The Ticket to Work (Ticket) program is a free and voluntary program that can help Social Security beneficiaries go to work, get a good job that may lead to a career, and become financially independent, all while they keep their Medicare or Medicaid. Individuals who receive Social Security benefits because of a disability and are aged 18 through 64 probably already qualify for the program.

- A free and voluntary program that connects SSI recipients with service providers called Employment Networks that provide access to meaningful employment.
- It supports career development for people who want to work.
- Information can be found at <https://www.ssa.gov/work/>.

Employment-Related Personal Assistant Services (EPAS)

This is a Medicaid service for people with disabilities who work and need medical assistance to maintain their employment. Eligible individuals must be employed in an integrated community setting, making at least minimum wage, working a minimum of 40 hrs/month, and need personal assistance to maintain work. It is not a waiver program and there is no waiting list. Go to <https://medicaid.utah.gov/ltc-2/epas/> for information and an application. A personal assistant may help with:

- Mobility in bed
- Transferring
- Ambulation
- Dressing
- Medication reminders
- Eating
- Toileting
- Transportation (for work)
- Personal hygiene
- Bathing
- Shopping
- Meal preparation
- Ordinary housework
- Laundry
- Managing finances

Services not provided include:

- Job coaching
- Reasonable accommodations
- Medical transportation or other benefits available via general Medicaid
- Other tasks not authorized on Care Plans

**A comprehensive list of all incentives can be found in the [Red Book](#) of the SSA.*



Utah Parent Center