

Expedited Reinstatement vs. Reapplication



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What is Expedited Reinstatement?

- EXR is a way to return more quickly to disability benefits when work is reduced or stopped

➔ DI 13050

What are the Expedited Reinstatement Requirements?

- Available to former SSDI, CDB, DWB or SSI beneficiaries
 - Prior entitlement terminated due to work
 - EXR request within 60 months of when prior benefit was terminated
 - No SGA work in month of EXR request
 - Unable to perform SGA due to disability
 - Current disabling condition is same as or related to prior
 - No medical improvement

What are requirements for reapplication?

- Does not need to be within 60 months of prior termination
- Medical and other requirements are the same as for any initial disability claim

Termination of Disability Benefits

- **No more benefits are payable on previous application**
 - **SSDI** – must have used TWP, EPE and other work incentives. (If still in EPE benefits not fully terminated.)
 - **SSI** – must have exhausted 1619(b) and have wages in excess of the applicable threshold. If 1619(b) eligible within prior 12 months don't need EXR

Deciding between ExR and New Claim-potential differences

- Provisional payments (only with EXR)
- Retroactivity
- Monthly amount
- Medicare
- Medical definition of disability
- Impact of returning to work
- Insured status required for new claim



Making the decision

- A person must choose between EXR and initial claim
- Only one can be awarded
- Current SSI recipient must choose:
 - SSDI option with most retroactivity
 - If entitlement dates are the same, must choose highest monthly benefit amount



Provisional Benefits-EXR only

- Are payable while the DDS conducts a medical review
- Up to six months of benefits can be paid
- Reinstated individual eligible for Medicare
- SSI reinstated individual eligible for Medicaid



SSDI Provisional Payments

- Paid to former beneficiary requesting EXR – not to family
- The amount is equal to the last monthly benefit amount payable increased by the amount of any COLAs plus earnings recomputations
- Begin with the month the individual files the reinstatement request



Provisional benefits are last payable earliest of:

- Month SSA issues a determination on EXR request
- Month the individual performs SGA
- Month prior to attainment of full retirement age
- The 6th month of provisional benefits
- If EXR is denied, provisional payments are generally not overpayments



Medical Disability Determinations

- Initial Claim Disability :
 - 12 month duration required
 - Past relevant work may be considered
 - Disabled means unable to do any other work in the economy
- Expedited Reinstatement Disability :
 - Prior (or similar) disabling condition must still exist
 - Disabled under medical improvement review standard



Retroactivity Differences Up to 12 months potential for both

- EXR: Pay only for non-SGA months
- New Claim: entitlement can't begin until after last successful SGA
 - UWA can be disregarded
- Retroactivity is up to 12 months from earliest protected filing date for both EXR and new claim



Retroactivity

- Example: Protective filing date August 1, 2011. SGA level earnings March through May 2011
 - EXR –
 - No payments for March through May
 - New Claim –
 - Successful work – earliest entitlement June 2011
 - UWA – earliest entitlement August 2010



Payment Amount

- EXR:
 - The amount is equal to the last amount payable increased by any COLAs plus earnings recomputations
- New Claim
 - Must meet insured status. Payment may or may not be higher than the EXR amount.



Medicare

- If DDS finds the beneficiary has medically improved, denying the Expedited Reinstatement request and the beneficiary has Extended Medicare, the Extended Medicare will terminate.
- An initial claim denial will not terminate Extended Medicare



Medicare Previously Terminated

- If beneficiary had Part A will have Part A coverage during provisional benefit period
 - (Part B can be requested if in a GEP or SEP)
- If beneficiary had Parts A and B, will have both during provisional benefit period if beneficiary elects Part B



EXR Work Incentives

- After receiving 24 months of payments during EXR Initial Reinstatement Period, the person is entitled to:
 - A new 9-month trial work period;
 - A new 36-month extended period of eligibility;
 - Ticket to Work – new Ticket with EXR
 - A new period of extended Medicare coverage; &
 - A new 60-month period to file an EXR request if the reinstated benefits terminate due to earnings



New Claim Work Incentives

- If new claim approved:
 - A new 9-month trial work period;
 - A new 36-month extended period of eligibility
 - New Ticket to Work
 - New or continued Medicare
 - New 60 months after termination to request EXR



If the SSDI EXR determination favorable:

- The beneficiary has their benefits recomputed and adjusted for provisional benefits paid and offsets
- Will receive retroactivity for months below SGA level (maximum 12 months prior to protective filing)
- Awarded Medicare as of date of entitlement
- Initial reinstatement period (IRP) of 24 payment months followed by TWP and EPE



If the reinstatement request is denied:

- The person has the right to file a subsequent EXR request.
- A person who refiles for EXR after a prior unfavorable decision cannot be paid provisional payments on the subsequent request if any provisional payments were paid on the prior request.
- An EXR denial can serve as protective filing for a new initial claim.



EXR Process

- Make ExR appointment with local SSA office
 - SSA-371, SSA-372, or SSA-373
 - SSA-795 for Medicare Part B election
 - SSA-454, and Medical releases (usual number)
 - SSA-821 or SSA-820 [SSA-821](#)
 - Disability Application



Expedited Reinstatement (EXR)

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8/22/2011

Questions?



More Information

➔ POMS [DI 13050.000 Expedited Reinstatement](#)

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- More about the WDBN online:
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