



**MAR 20 2017**

RELEASE – REVISION OF EXHIBIT 695 OF RESOURCE BOOK, DCMWC PROCEDURE MANUAL

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BLBA TRANSMITTAL NO. 17-03

March 2017

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**EXPLANATION OF MATERIAL TRANSMITTED:**

This transmittal updates Exhibit 695 by adding the 2016 annual and monthly earnings offset exempt amounts.

REMINDER – Public Law 106-182, enacted in April 2000, eliminated the Social Security retirement earnings test in and after the month in which a person attains full retirement age. The addendum to this exhibit provides a table of full retirement ages. Elimination is effective with respect to taxable years ending after December 31, 1999.

A handwritten signature in blue ink, appearing to read "Michael A. Chance".

MICHAEL A. CHANCE  
Director, Division of Coal  
Mine Workers' Compensation

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**FILING INSTRUCTIONS:**

Remove Old Exhibit

Insert New Exhibit

PM Resource Book

PM Resource Book

Exhibit # 695

Exhibit # 695

DISTRIBUTION: All DCMWC Staff

## EARNINGS OFFSET

## CHART OF ANNUAL AND MONTHLY EXEMPT AMOUNTS

| <u>Effective Date</u>            | <u>Rate Per Year</u>   | <u>Rate Per Month</u> |
|----------------------------------|------------------------|-----------------------|
| 01/01/74 .....                   | \$2,400 .....          | \$200                 |
| 01/01/75 .....                   | 2,520 .....            | 210                   |
| 01/01/76 .....                   | 2,760 .....            | 230                   |
| 01/01/77 .....                   | 3,000 .....            | 250                   |
| 01/01/78 (for persons under FRA) | 3,240 .....            | 270                   |
| (for persons FRA to 71)          | 4,000 .....            | 333                   |
| (for persons 72 or over)         | (No limit on earnings) |                       |
| 01/01/79 (for persons under FRA) | 3,480 .....            | 290                   |
| (for persons FRA to 71)          | 4,500 .....            | 375                   |
| (for persons 72 or over)         | (No limit on earnings) |                       |
| 01/01/80 (for persons under FRA) | 3,720 .....            | 310                   |
| (for persons FRA to 71)          | 5,000 .....            | 417                   |
| (for persons 72 or over)         | (No limit on earnings) |                       |
| 01/01/81 (for persons under FRA) | 4,080 .....            | 340                   |
| (for persons FRA to 71)          | 5,500 .....            | 459                   |
| (for persons 72 or over)         | (No limit on earnings) |                       |
| 01/01/82 (for persons under FRA) | 4,440 .....            | 370                   |
| (for persons FRA to 71)          | 6,000 .....            | 500                   |
| (for persons 72 or over)         | (No limit on earnings) |                       |
| 01/01/83 (for persons under FRA) | 4,920 .....            | 410                   |
| (for persons FRA to 69)          | 6,600 .....            | 550                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |
| 01/01/84 (for persons under FRA) | 5,160 .....            | 430                   |
| (for persons FRA to 69)          | 6,960 .....            | 580                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |
| 01/01/85 (for persons under FRA) | 5,400 .....            | 450                   |
| (for persons FRA to 69)          | 7,320 .....            | 610                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |
| 01/01/86 (for persons under FRA) | 5,760 .....            | 480                   |
| (for persons FRA to 69)          | 7,800 .....            | 650                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |
| 01/01/87 (for persons under FRA) | 6,000 .....            | 500                   |
| (for persons FRA to 69)          | 8,160 .....            | 680                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |
| 01/10/88 (for persons under FRA) | 6,120 .....            | 510                   |
| (for persons FRA to 69)          | 8,400 .....            | 700                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |
| 01/01/89 (for persons under FRA) | 6,480 .....            | 540                   |
| (for persons FRA to 69)          | 8,880 .....            | 740                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |
| 01/01/90 (for persons under FRA) | 6,840 .....            | 570                   |
| (for persons FRA to 69)          | 9,360 .....            | 780                   |
| (for persons 70 or over)         | (No limit on earnings) |                       |

(See PM Chapter 2-1403.13)

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## EARNINGS OFFSET (Continued)

## CHART OF ANNUAL AND MONTHLY EXEMPT AMOUNTS

| <u>Effective Date</u> |                           | <u>Rate Per Year</u>   | <u>Rate Per Month</u> |
|-----------------------|---------------------------|------------------------|-----------------------|
| 01/01/91              | (for persons under FRA)   | 7,080 .....            | 590                   |
|                       | (for persons FRA to 69)   | 9,720 .....            | 810                   |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/92              | (for persons under FRA)   | 7,440 .....            | 620                   |
|                       | (for persons FRA to 69)   | 10,200 .....           | 850                   |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/93              | (for persons under FRA)   | 7,680 .....            | 640                   |
|                       | (for persons FRA to 69)   | 10,560 .....           | 880                   |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/94              | (for persons under FRA)   | 8,040 .....            | 670                   |
|                       | (for persons FRA to 69)   | 11,160 .....           | 930                   |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/95              | (for persons under FRA)   | 8,160 .....            | 680                   |
|                       | (for persons FRA to 69)   | 11,280 .....           | 940                   |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/96              | (for persons under FRA)   | 8,280 .....            | 690                   |
|                       | (for persons FRA to 69)   | 12,500 .....           | 1,042                 |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/97              | (for persons under FRA)   | 8,640 .....            | 720                   |
|                       | (for persons FRA to 69)   | 13,500 .....           | 1,125                 |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/98              | (for persons under FRA)   | 9,120 .....            | 760                   |
|                       | (for persons FRA to 69)   | 14,500 .....           | 1,208                 |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/99              | (for persons under FRA)   | 9,600 .....            | 800                   |
|                       | (for persons FRA to 69)   | 15,500 .....           | 1,292                 |
|                       | (for persons 70 or over)  | (No limit on earnings) |                       |
| 01/01/00              | (for persons under FRA)   | 10,080 .....           | 840                   |
|                       | (for persons FRA or over) | (No limit on earnings) |                       |
| 01/01/01              | (for persons under FRA)   | 10,600 .....           | 883                   |
|                       | (for persons FRA or over) | (No limit on earnings) |                       |
| 01/01/02              | (for persons under FRA)   | 11,280 .....           | 940                   |
|                       | (for persons FRA or over) | (No limit on earnings) |                       |
| 01/01/03              | (for persons under FRA)   | 11,520 .....           | 960                   |
|                       | (for persons FRA or over) | (No limit on earnings) |                       |
| 01/01/04              | (for persons under FRA)   | 11,640 .....           | 970                   |
|                       | (for persons FRA or over) | (No limit on earnings) |                       |
| 01/01/05              | (for persons under FRA)   | 12,000 .....           | 1,000                 |
|                       | (for persons FRA or over) | (No limit on earnings) |                       |
| 01/01/06              | (for persons under FRA)   | 12,480 .....           | 1,040                 |
|                       | (for persons FRA or over) | (No limit on earnings) |                       |

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## EARNINGS OFFSET (Continued)

## CHART OF ANNUAL AND MONTHLY EXEMPT AMOUNTS

| <u>Effective Date</u>  | <u>Rate Per Year</u>    | <u>Rate Per Month</u> |
|--|-------------------------|-----------------------|
| 01/01/07 (for persons under FRA)   | 12,960 .....            | 1,080                 |
| (for persons FRA or over)  | (No limit on earnings)  |                       |
| 01/01/08 (for persons under FRA)   | 13,560 .....            | 1,130                 |
| (for persons FRA or over)  | (No limit on earnings)  |                       |
| 01/01/09 (for persons under FRA)   | 14,160 .....            | 1,180                 |
| (for persons FRA or over)  | (No limit on earnings)  |                       |
| 01/01/10 (for persons under FRA)   | 14,160 .....            | 1,180                 |
| (for persons FRA or over)  | (No limit on earnings)  |                       |
| (persons who reach FRA during 2010 must deduct \$1 for each \$3 earned above 37,680 - 3,140/month - until the month they reach FRA)  |                         |                       |
| 01/01/11 (for persons under FRA)   | 14,160 .....            | 1,180                 |
| (for persons FRA or over)  | (No limits on earnings) |                       |
| (persons who reach FRA during 2011 must deduct \$1 for each \$3 earned above 37,680 - 3,140/month - until the month they reach FRA)  |                         |                       |
| 01/01/12 (for persons under FRA)   | 14,640 .....            | 1,220                 |
| (for persons FRA or over)  | (No limits on earnings) |                       |
| (persons who reach FRA during 2012 must deduct \$1 for each \$3 earned above 38,880 - 3,240/month until the month they reach FRA)    |                         |                       |
| 01/01/13 (for persons under FRA)   | 15,120 .....            | 1,260                 |
| (for persons FRA or over)  | (No limits on earnings) |                       |
| (persons who reach FRA during 2013 must deduct \$1 for each \$3 earned above 40,080 - 3,340/month until the month they reach FRA)    |                         |                       |
| 01/01/14 (for persons under FRA)   | 15,480 .....            | 1,290                 |
| (for persons FRA or over)  | (No limits on earnings) |                       |
| (persons who reach FRA during 2014 must deduct \$1 for each \$3 earned above 41,400 - 3,450/month until the month they reach FRA)    |                         |                       |
| 01/01/15 (for persons under FRA)   | 15,720 .....            | 1,310                 |
| (for persons FRA or over)  | (No limits on earnings) |                       |
| (persons who reach FRA during 2015 must deduct \$1 for each \$3 earned above 41,880 - 3,490/month until the month they reach FRA)    |                         |                       |
| 01/01/16 (for persons under FRA)   | 15,720 .....            | 1,310                 |
| (for persons FRA or over)  | (No limits on earnings) |                       |
| (persons who reach FRA during 2016 must deduct \$1 for each \$3 earned above 41,880 - 3,490/month until the month they reach FRA)    |                         |                       |
| 01/01/17 (for persons under FRA)   | 16,920 .....            | 1,410                 |
| (for persons FRA or over)  | (No limits on earnings) |                       |
| (persons who reach FRA during 2016 must deduct \$1 for each \$3 earned above 44,880 - 3,740.00/month until the month they reach FRA) |                         |                       |

(See PM Chapter 2-1403.13)

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## ADDENDUM - TABLE FOR FULL RETIREMENT AGE

| Full Retirement Age  | Year of Birth   |
|----------------------|-----------------|
| 65 years             | 1937 or earlier |
| 65 years + 2 months  | 1938            |
| 65 years + 4 months  | 1939            |
| 65 years + 6 months  | 1940            |
| 65 years + 8 months  | 1941            |
| 65 years + 10 months | 1942            |
| 66 years             | 1943 - 1954     |
| 66 years + 2 months  | 1955            |
| 66 years + 4 months  | 1956            |
| 66 years + 6 months  | 1957            |
| 66 years + 8 months  | 1958            |
| 66 years + 10 months | 1959            |
| 67 years             | 1960 or later   |