

Instructions for using the PTD Calculator

Mistakes

If you accidentally delete a formula or enter the wrong information, use the “Undo” button or close the file without saving your changes.



Calculator

The spreadsheet has four tabs: (A) PTD owed; (B) PTD paid; Rates, adjustments; and SS retirement.

Certain cells and column headings are shaded; these will need to have information entered into them.

If the date of injury is Oct. 1, 1995 or later, columns J through M and O will be shaded gray. Do not enter anything in these columns; they are for supplementary benefit calculations and do not apply for dates of injury of Oct. 1, 1995 and later.

Key dates to know

- Date of injury
- Date of birth
- Date the employee reaches age 65
- The first day of the month after the employee reaches age 65 (non-Social Security MSRS/PERA retirement benefits begin then)
- The date that \$25,000 in permanent total disability (PTD) payments was reached (offsets are not allowed before that date)
- Oct. 1 (for dates of injury Oct. 2, 1975, through Sept. 30, 1981, the annual Minnesota Statutes 176.645 adjustment occurs then and supplementary benefit rates change)
- The date of the injury for annual Minn. Stat. 176.645 adjustments
- When the Minn. Stat. 176.645 adjustments begin
- The date Social Security began
- Dec. 1 (Social Security benefits change)
- The date PERA/MSRS, etc. benefits began
- Jan. 1 (PERA, MSRS, etc. benefits change)

Dates, dollar amounts

Enter dates in the MM/DD/YYYY format.

Enter dollar amounts as a regular number with a decimal. The cells are formatted for currency.

Certain cells are locked and you will not be able to enter anything in these cells.

If you have problems or questions regarding the spreadsheet, email the Workers' Compensation Division Help Desk at helpdesk.dli@state.mn.us. Note: The Department of Labor and Industry cannot accept emailed spreadsheets.

Tab: (A) PTD owed

Cells, part one

- B1 – enter the employee's name
- B2 – enter the date of injury
- B3 – enter the date the employee became permanently, totally disabled
- B4 – enter the date when \$25,000 in PTD payments was reached
- E1 – enter the employee's worker identification (WID) number
- E3 – enter the employee's date of birth
- E4 – enter the date that the age of Social Security retirement benefits began; see the highlighted cell on the "SS retirement" tab
- G4 – enter the date that the non-Social Security benefits changed from disability to retirement

Columns

- A and B – beginning with row eight, enter the "From" and "Through" dates; enter a new period when the payments or offsets change
- D – beginning with row eight, enter the weekly PTD rate for each period
- E – beginning with row eight, enter the weekly Social Security Disability Insurance rate for each period; the 5% offset will be calculated based on the amount in this column
- F – beginning with row eight, enter the weekly Social Security retirement rate for each period
 - **Note:** If the Social Security disability benefits change to retirement, make sure you enter the retirement amounts in column F, otherwise the 5% offset will continue to calculate.
- G – in row seven, check the appropriate boxes for the non-Social Security benefit being offset
- G – beginning with row eight, enter the weekly non-Social Security disability rate for each period.
 - **Note:** If more than one benefit is being offset, put the total in column G and identify and put the individual amounts in the "Comments" column (Q).
 - **Note:** The offset *stops* when the disability benefit changes to retirement; do not enter anything after that date

- J – for dates of injury before Oct. 1, 1995, beginning with row eight, enter the maximum supplementary benefit (SB) rate for each period

Columns C, H, I and K through N will automatically calculate.

Cells, part two

- N2 – **“Total owed”** is the total PTD owed or due; this totals the amounts in column N, beginning with row eight
- O2 – **“Total owed”** is the total SB owed or due; this totals the amounts in column O, beginning with row eight
- P2 – **“Total owed”** is the total of PTD and SB owed or due; this totals the amounts in column P, beginning with row eight.
- N3 – **“Total paid”** is the total of PTD benefits paid on the claim; this is the total of column N, beginning with row eight from the “(B) PTD paid” tab.
- O3 – **“Total paid”** is the total of SB paid on the claim; this is the total of column O, beginning with row eight from the “(B) PTD paid” tab.
- P3 – **“Total paid”** is the total of PTD benefits and SB paid on the claim; this is the total of column P, beginning with row eight from the “(B) PTD paid” tab.
- N4 – **“Underpayment”** is the difference between cell N2 minus cell N3; a positive number indicates an underpayment of PTD benefits
- O4 – **“Underpayment”** is the difference between cell O2 minus cell O3; a positive number indicates an underpayment of SB
- P4 – **“Underpayment”** is the difference between cell P2 minus cell P3; a positive number indicates an underpayment of both PTD benefits and SB

Tab: (B) PTD paid

Columns

Note: Columns H, I, K, L, M, N, O and P all perform calculations. If you paid amounts that are different than the calculated amounts, enter your amounts in the appropriate cells.

- A and B – beginning with row eight, enter the “From” and “Through” dates; enter a new period when the payments or offsets change
- C – beginning with row eight, enter the number of weeks paid
- D – beginning with row eight, enter the weekly PTD rate for each period
- E – beginning with row eight, enter the weekly *SSDI* rate for each period; the 5% offset will be calculated based on the amount in this column

- F – beginning with row eight, enter the weekly Social Security *retirement* rate for each period
 - **Note:** If the Social Security disability benefits change to retirement, make sure you enter the retirement amounts in column F, otherwise the 5% offset will continue to calculate.
- G – in row seven, check the appropriate boxes for the non-Social Security benefit being offset
- G – beginning with row eight, enter the weekly non-Social Security disability rate for each period
 - **Note:** If more than one benefit is being offset, put the total in column G and identify and put the individual amounts in the “Comments” column (Q).
 - **Note:** The offset *stops* when the disability benefit changes to retirement. Do not enter anything after that date.
- G – in row seven, check the appropriate boxes for the non-Social Security benefit being offset
- G – continue to enter the non-Social Security disability or retirement rates if the offset for these continued after the disability changed to retirement
- I – if the amount of PTD benefits paid for a given time period does not equal what is shown on the spreadsheet, change the spreadsheet to reflect what was paid
- M – if the amount of SB paid for a given time period does not equal what is shown on the spreadsheet, change the spreadsheet to reflect what was paid
- N – if the amount of PTD benefits paid for a given time period does not equal what is shown on the spreadsheet, change the spreadsheet to reflect what was paid

Cells

- N2 – **“Total owed”** is the total PTD owed or due; this totals the amounts in column N, beginning with row eight
- O2 – **“Total owed”** is the total SB owed or due; this totals the amounts in column O, beginning with row eight
- P2 – **“Total owed”** is the total of PTD benefits and SB owed or due; this totals the amounts in column P, beginning with row eight
- N3 – **“Total paid”** is the total of PTD benefits paid on the claim; this is the total of column N, beginning with row eight from the “(B) PTD paid” tab
- O3 – **“Total paid”** is the total of SB paid on the claim; this is the total of column O, beginning with row eight from the “(B) PTD paid” tab
- P3 – **“Total paid”** is the total of PTD benefits and SB paid on the claim; this is the total of column P, beginning with row eight from the “(B) PTD paid” tab.
- N4 – **“Underpayment”** is the difference between cell N2 minus cell N3; a positive number indicates an underpayment of PTD benefits
- O4 – **“Underpayment”** is the difference between cell O2 minus cell O3; a positive number indicates an underpayment of SB
- P4 – **“Underpayment”** is the difference between cell P2 minus cell P3; a positive number indicates an underpayment of both PTD benefits and SB

The tabs are formatted to print.

Tab: Rates, adjustments

Columns

- A through D – shows the SB effective dates and rates
- F through I – shows the Social Security effective dates and percent increase from the previous year
- K through N – shows the MSRS effective dates and percent increase from the previous year
- P through R – shows the PERA effective dates and percent increase from the previous year
- T – information on Minn. Stat. 176.645 adjustment dates, Social Security retirement ages and calculators to determine the weekly, monthly or annual amounts

Tab: SS retirement

The “Information” tab shows the date Social Security retirement benefits start based on the employee’s birthdate. Look for the highlighted cell. This spreadsheet is protected.

The spreadsheets are for purposes of the Special Compensation Fund relief in Minn. Stat. 176.1292 only.