



# PRACTICAL GUIDE SOCIAL INTEGRATION INCOME

INSTITUTO DA SEGURANÇA SOCIAL, I.P.

## **TECHNICAL FILE**

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*The information in this practical guide does not waive the consultation of the law.*

## A – Social Integration Income (RSI) – What is it?

It is a social support aimed at protecting people who are in extreme poverty. This support includes:

- a **cash benefit**, to ensure that these people have enough resources to cover their basic needs, and
- an Integration Programme that includes a Social Integration Contract (a set of actions established in accordance with the features and conditions of the applicant's household, aiming at their progressive social, professional and community integration).

## B1 - Who is entitled?

Who is entitled to the Social Integration Income (RSI)?

Entitlement condition to the RSI

What are the entitlement conditions to the RSI?

Entitlement conditions considering all the household members

### Who is entitled to the Social Integration Income (RSI)?

Persons or families who need support to improve their social and professional integration, who are in a situation of extreme poverty and fulfil the other entitlement conditions to the RSI.

Beneficiaries who are providing essential care to members of their household, within the scope of the informal carer scheme.

#### If the applicant lives alone

The total amount of his/her monthly income **cannot be equal to or higher than €237,25**.

#### If the applicant lives with other family members

The total amount of the monthly income of all household members cannot be equal to or higher than the maximum RSI amount, calculated according to the household composition.

The maximum RSI amount corresponds to the sum of the following amounts for each household member:

For the benefit holder	€237,25 (100% of the RSI amount)
For each adult	€166,08 (70% of the RSI amount)
For each child	€118,63 (50% of the RSI amount)

#### Entitlement condition to the RSI

The granting of the RSI benefit depends on the value of movable assets held by the beneficiary and/or the members of his household (bank deposits, shares, bonds, postal savings certificates,

participation securities and units in collective investment institutions or other financial assets). This value must not exceed €30.555,60 (60 times the Social Support Index value).

## What are the entitlement conditions to the RSI?

### Entitlement conditions

1. The applicant must have legal residence in Portugal.
  - **Citizens of the European Union**, European Economic Area and third countries that have an agreement on the free movement of persons within the European Union → must have legal residence in Portugal.
  - Citizens of other countries → must have legal residence in Portugal for at least one year;
  - Citizens with refugee status → must have legal residence in Portugal.
2. The applicant is in a situation of extreme poverty
3. The applicant must make a formal and express commitment to conclude the Social Integration Contract, namely by being available to work, attend training courses or accept other appropriate forms of social integration.
4. The applicant must be aged 18 or more.
5. In case the applicant is under 18 years of age and his/her personal income is higher than 70% of the RSI amount (€166,08), he/she may also be entitled to the RSI benefit, if:
  - she is pregnant;
  - he/she is married or living in a *de facto* relationship for more than 2 years;
  - he/she has children or takes care of disabled people who are exclusively dependent on the household income, (i.e., their personal income is equal to or lower than 70% of the RSI amount (€166,08€))
6. If the applicant is unemployed but can work, he/she must be registered in the Employment Centre of his/her residence area.

Please note: The applicant is exempt from the condition of registration in the Employment Centre if he/she is working, or submits a document issued by the Employment Centre certifying that he/she does not meet the necessary conditions to work, or is duly recognised as a primary informal carer by the competent Social Security services.

7. The applicant must give permission to the Social Security Institute to access all information relevant to the assessment of his/her social and economic situation (this statement is included in the RSI application form).
8. If the applicant became unemployed on his/her own initiative (without just cause), he/she may only apply to the RSI benefit one year after the date of unemployment.
9. The applicant cannot be in pre-trial detention or serving a prison sentence. However, he/she may apply for the RSI within 45 days before the expected date of his/her release.
10. The applicant cannot be accommodated in state-funded establishments, unless he/she is provisionally accommodated in social responses of temporary nature and has a defined personal integration plan, or is accommodated in therapeutic communities or inpatient units of the National Network of Integrated long-term Care. However, he/she may apply for the RSI within 45 days before the expected date of his/her exit or discharge.

11. The applicant must not be benefiting from social support within the scope of the scheme for granting asylum or refugee status.

**Please note:** The RSI applicant must submit all the necessary documents (his/hers and of the household members), as well as give permission to the competent management entity to access all information relevant to the assessment of the financial and economic situation of the persons concerned.

## **B2 - How does this benefit relate to other benefits that I already receive or may receive in the future?**

### **RSI benefit can be accumulated with:**

- Old-age social pension
- Widow's/Widower's pension
- Orphan's pension
- Long-term care supplement
- Solidarity supplement for the elderly
- Disability Bonus
- Allowance for care provided by a third party
- Allowance for attending special education establishments
- Family benefit for children and young people
- Prenatal family benefit
- Parenting and adoption allowances
- Sickness benefit
- Unemployment benefit
- Social Inclusion Benefit - Basic Component

## **C - How to apply for the Social Integration Income benefit? C1 - Necessary forms and documents.**

Forms

Necessary documents

Documents to submit when required

Capital or property income

Where to submit the application

### **Forms**

- Mod. RSI 1 – *Requerimento Rendimento Social de Inserção* (Application – Social Integration Income)

- Mod. RSI 1-1 – Folha de continuação do requerimento Mod. RSI 1 (Continuation Sheet of application Mod. RSI 1)
- Mod. RSI 1-2 – Informações e instruções de preenchimento do Mod. RSI 1 (Information and instructions for completing form Mod. RSI 1)
- Mod. RV 1017 – Identificação de pessoas singulares abrangidas pelo sistema de proteção social de cidadania (Identification of natural persons covered by the citizenship social protection system)
- Mod. RV 1017/1 - Folha de Continuação do Mod. RV 1017 - Identificação de pessoas singulares abrangidas pelo sistema de proteção social de cidadania (Continuation sheet of form Mod. RV 1017 – Identification of natural persons covered by the citizenship social protection system)
- Mod RSI 28 – Rendimento Social de Inserção/ Declaração de Alterações (Social Integration Income/ Statement of Change of Circumstances)
- Mod. RSI 28-2 – Informações e instruções de preenchimento do Mod. RSI 28 (Information and instructions for completing form Mod. RSI 28)

These Forms/Models are available at [www.seg-social](http://www.seg-social); in the **Acessos Rápidos** (Quick Access) menu, click on **Formulários** (Forms) and in the field **Pesquisar por palavra-chave** (Keyword Search) insert the form/model number or name.

For example, if you want to access the Social Integration Income application, you must insert “RSI1” or “Requerimento Rendimento Social de Inserção” in the *Search* field.

### **Necessary documents**

- Valid identification document of the applicant and of the other household members (citizen card or ID document, civil registration certificate, birth certificate, passport).
- Tax identification document (NIF) of the applicant and of the other household members (in case they do not have a citizen card).
- Copies of documents supporting the applicant’s actual earnings (salary) in the month prior to the date of the application submission, in case of regular income.
- Copies of documents supporting the applicant’s actual earnings (salary) in the three months prior to the date of the application submission, in case of variable income.
- Copies of the following documents proving legal residence in Portugal, issued by a competent authority:
  - a) **Citizens of the European Union**, European Economic Area and third countries that have an agreement on the free movement of persons within the European Union: Registration certificate of the right of residence, issued by the Municipal Council of the residence area of the person concerned.
  - b) Citizens of other countries: Temporary stay visa, residence visa, temporary residence permit and permanent residence permit, in order to assess if the person

concerned has legal residence in Portugal for at least one year.

- c) Citizens with refugee status: residence permit with the title type "Refugee".

**Documents to submit when required:**

- Proof of attendance issued by the educational or vocational training establishment, if the applicant is aged 16 or over and is studying or undergoing vocational training (to prove exemption from registration in the Employment Centre).

Note: Young people entitled to social security family benefits are exempt from this requirement.

- Document issued by the IEFP (*Instituto de Emprego e Formação Profissional* – Employment and Vocational Training Institute) certifying that the applicant does not meet the necessary conditions to work.
- Proof of disability (if the disabled person is a member of the applicant's household and the applicant is under 18 years of age).
- Medical statement proving pregnancy (if the applicant is under 18 years of age).
- Certificate of temporary incapacity for work, proving that the applicant is not able to work for a period due to health reasons, or because he/she is providing essential care to members of his/her household.
- Copy of the Income Tax return concerning the calendar year preceding the year of the application, in case the person concerned is not exempt from the income statement submission to the tax authorities and the social security competent services do not have access to this information.
- Multipurpose certificate
- Other documents that may be requested by the management entity.

**Capital or property income**


If the applicant or any of the members of his/her household states in the application that he/she has income from capital or property, the following documents must also be submitted:

- Copies of documents supporting the issuing of rent receipts;
- ✓ - Copies of documents supporting the value of credits deposited in bank accounts and securities admitted to trading on a regulated market, as well as their respective income, including bank statements.

**Where to submit the application**

- In person, at the Social Security Customer Information Services
- Using the Social Security digital channel **e-Clic**:

Access your personal area on the Social Security Online Service (SSD – *Segurança Social Direta*); in the **Perfil** (Profile) menu, select the **e-Clic – contactos** (e-Clic – Contacts) option or click on

the  icon and take the following steps:



- I. In **Criar pedido** (Create a request) → Describe what is your request to the Social Security services [For example: **Pedir prestações** – (Apply for benefits)]; → Click on **Seguinte** (Next);
- II. In **Definir Tema** → **Evento de Vida** (Define Theme → Life Event), click on **Apoio Social** (Social support) → in **Assunto** (Topic), click on **Rendimento Social de Inserção** (Social Integration Income) → in **Motivo** (Reason), click on **Apresentar um pedido** (Submit a request) → click on: **Confirmar Seleção** (Confirm selection);
- III. In **Continuar com o Pedido** (Proceed with the Request) → click on **Formulários** (Forms);
- IV. A table with the application forms for the Social Integration Income (RSI – *Rendimento Social de Inserção*) will be displayed on the screen;
- V. Select the form and complete it according to the instructions → Save the document in a folder on your computer (Repeat this procedure for all the necessary documents) → click on **Continuar com o pedido** (Proceed with the request).
- VI. In **Adicionar documentos** (Add documents) → attach the documents according to the instructions.
- VII. Click on **Resumo** (Summary) → **Submeter pedido** (Submit request).

## D - How does this benefit work? D1 - How much will I receive and when will I receive it?

Social Integration Income amount

Income considered

How is the benefit amount calculated?

Entitlement period.

When will the benefit be paid?

Extension of the entitlement period.

### Social Integration Income amount

The benefit monthly amount is equal to the difference between the RSI amount, calculated according to the household composition, and the total amount of the household income (or the person's income, if the applicant lives alone).

**Please note:** the benefit amount is not a fixed value; it varies, according to the changes in the household composition and/or in the respective income.

### Income considered

1 - The following income categories are considered in the calculation of the household monthly income:

- Employment income

Please note: Young people's income from work carried out under an employment contract during school holidays, in accordance with Article 83-A *et seq.* of Law no. 110/2009 of 16 September – Code of Contributory Schemes of the Social Security Welfare System – is not considered.

- Income from self-employment work (business and professional)

The relevant business and professional monthly income of self-employed workers is calculated in accordance with the Code of Contributory Schemes of the Social Security Welfare System (*Código dos Regimes Contributivos do Sistema Previdencial de Segurança Social*); this amount cannot be lower than the contribution base (for more information, please consult the **Guia Prático - Inscrição, Alteração e Cessação de Atividade de Trabalhador Independente** (Practical Guide – Registration, Change and Termination of Self-employment Activity) available at [www.seg-social](http://www.seg-social); in the **Acessos Rápidos** (Quick Access) menu, click on **Guias Práticos** (Practical Guides) and in the field **Pesquisar por palavra-chave** (Keyword Search) insert the Practical Guide name.

- Capital income (see paragraph 3).
- Property income (see paragraph 4).
- Pensions (including alimony or benefits granted within the scope of the Child Support Guarantee Fund – *Fundo de Garantia de Alimentos a Menores*).
- Social Benefits

**Please note:** Social benefits are all social security benefits, allowances or social support granted on a continuous basis, with the exception of cash benefits granted within the scope of the family protection subsystem, aimed to ensure compensation for family, disability and dependency expenses.

- Monthly allowance received during the performance of occupational activities of social interest related to programmes in the employment area.
- Allowances to support rent payments or other housing supports from the State, received on a regular basis.

2 - If the family already lives in social housing when the RSI application is submitted, the following amounts are added to the household monthly income:

- €15,45 – in the first year of the RSI benefit granting.
- €30,91 – from the date of the first annual extension of the RSI benefit granting.
- €46,36 – from the date of the second annual extension of the RSI benefit granting and subsequent ones.

If the family starts living in social housing only in a year after the RSI granting, the same values apply, by reference to the year from which the family started living in social housing.

3 - If some of the family members (including the applicant) have movable assets (bank deposits, shares, postal savings certificates or other financial assets), 1/12 of the highest values of the following assets shall be considered as capital income:

- i) The value of capital income earned (interest on bank deposits, stock dividends or income from other financial assets).
- ii) 5% of the total value of the movable assets on 31 December of the previous year (credits deposited in bank accounts, shares, postal savings certificates or other financial assets).

4 - If some of the family members are property owners, 1/12 of the total value of the following assets shall be considered as property income:

- a) Permanent residence (only if the permanent residence asset value is higher than 450 times the Social Support Index (IAS – Indexante dos Apoios Sociais) value, i.e., €229.167,00.
  - i) *5% of the difference between the permanent residence asset value and €229.167,00. (if the difference is positive).*
- b) Remaining property, except the permanent residence. The higher value of the ones listed below shall be considered:
  - i) *The amount of rents actually received;*
  - ii) *5% of the sum of all the properties asset value (except permanent residence).*

#### **How is the benefit amount calculated?**

- First, the RSI amount is calculated according to the household composition, by adding:
  - €237,25 for the applicant
  - €166,08 for the second adult and subsequent ones:
  - €118,63 for each child or young person aged under 18.

For example, for a family with three adults and one child the RSI amount will be: €237,25 + €166,08 + €166,08 + €118,63 = €688,04

- Then, in what concerns employment income, in the case of regular income, it is considered the total amount of employment income of all the household members in the month prior to the application submission or, in case of variable income, the average income in the three months immediately before the application submission. The benefit amount is calculated by adding:
  - 80% of the employment income, after deducting the social security contributions.
  - 100% of the other categories' income.

**Please note:** If one of the household members or the RSI beneficiary (the applicant) was unemployed, but started working after the RSI benefit has been granted, only 50% of the employment income received during the first 12 continuous or non-continuous months will be taken into account.

For the calculation of 50% or 80% of income, the twelfths of the Christmas Bonus and Holiday Pay are taken into account, monthly, i.e., 1/12 of the Christmas Bonus and Holiday Pay amounts received by the household member are considered as employment income.

The total amount of the household income in the month before the application submission is calculated as follows:

- To the employment income of each household member is added the income from, among others, pensions, social benefits, capital income, property income, public housing support and allowances received within the scope of the CEI and CEI+ Contracts (Employment-integration contacts), among others

In order to calculate the benefit amount, the total amount of the household income (for example, €300,00) is deducted from the RSI amount (€688,04), i.e., the amount of the benefit will be: €688,04 - €300,00 = €388,04.

#### **Entitlement period**

The RSI entitlement period is 12 months. This period may be extended, provided that the qualifying conditions are maintained.

**Please note:** The 12-month period is counted from the date the social security services receive a duly complete application with all the necessary documents.

#### **When does the benefit start to be paid?**

The Social Integration Income (RSI) is paid as from the date the application is considered duly complete (i.e., all the supporting documents to assess the qualifying conditions were submitted) and provided that it was approved by the competent services.

However, there are the following exceptions:

- People in pre-trial detention or serving a prison sentence shall **receive the benefit in the month of their release;**
- People who are provisionally accommodated in social responses of temporary nature and have a defined personal integration plan or those who are accommodated in therapeutic communities or in-patient units of the national network of integrated long-term care **shall receive the benefit in the month of their exit or discharge.**

The beneficiary must sign a Social Integration Contract within 45 days after the RSI benefit is granted.

### Extension of the entitlement period

The extension of the entitlement period procedure is carried out *ex officio* by the competent management entity and it is based on the household composition and income registered in the Social Security Information System.

This procedure begins in the second month before the end of the benefit annuity.

When the extension of the entitlement procedure is concluded, the beneficiary is notified of the decision.

## D2 – RSI benefit payment

The payment of the RSI benefit can be made by:

- bank transfer, or
- mail (postal order)

### Payment by bank transfer is faster and safer

#### How can I inform the social security services that I want to receive my benefits by bank transfer?

1. If you use **the Social Security Online Service (*Segurança Social Direta*)**, the IBAN is immediately registered in the Social Security Information System:

Access the Social Security portal on the Internet at [www.seg-social.pt](http://www.seg-social.pt);

Click on ***Segurança Social Direta*** (Social Security Online Service);

Insert your **NISS** (Social Security Identification Number) and **Password**;

In the ***Perfil*** (Profile) menu, click on ***Conta bancária*** (bank account) > ***Alterar conta bancária*** (*Change bank account*)

Insert your **IBAN** and confirm.

2. **At the Social Security customer information services**

By filling in Form/Model ***MG 14 – Requerimento de Registo ou Alteração de IBAN*** (Application for IBAN registration or change) and submitting a copy of the document attesting your IBAN.

This Form/Model is available at [www.seg-social.pt](http://www.seg-social.pt); in the ***Acessos Rápidos*** (Quick Access) menu, click on ***Formulários*** (Forms) and in the field ***Pesquisar por palavra-chave*** (Keyword Search) insert the form/model number or name.

### Minimum Banking Services

If you do not have a current bank account yet, you may open a minimum banking services account at any bank. The annual cost is less than 1% of the national minimum wage.

To find out if you meet all the necessary criteria and to get more information on this matter, please consult the website <https://cliente bancario.bportugal.pt/> or go to any Social Security customer information service.

### **Payment by mail (postal order)**

Postal orders may be withdrawn at the Portuguese postal services (CTT) or deposited in banks. They may also be endorsed (passed or transmitted), and there can only be one endorsement on each postal order issued.

## **D3 – Duties of the RSI beneficiary**

Duties of the RSI beneficiary (the applicant)

Duties of all the household members

What happens if the RSI beneficiary and the household members do not sign the Social Integration Contract within the established time limit, or do not comply with the Social Integration Contract terms?

If the RSI beneficiary does not sign the Social Integration Contract

If the household members do not sign the Social Integration Contract

When it is considered that the person(s) concerned refused to sign the Social Integration Contract?

If the RSI beneficiary and the household members do not comply with the Social Integration Contract terms

If the RSI beneficiary refuses to conclude his/her personal employment plan

### **Duties of the RSI beneficiary (the applicant)**

The beneficiary must

- notify the social security services within 10 business days following the date of changes that may interrupt or terminate the right to the RSI benefit, as well as the change of address.
- submit to the Social Security services the documents proving that he/she is in an economic hardship situation.
- attend the meetings convened by the Local Integration Service (*Núcleo Local de Inserção*) where the Social Integration Contract is defined, signed and reviewed.
- sign the Social Integration Contract.

**Please note:** The Social Integration Contract includes the care provided by the beneficiaries as primary and non-primary informal carers, that is considered a new integration measure. The proof of carer statute is made *ex officio* by the social security services.

- fulfil the obligations set in the Social Integration Contract, and

- be available to apply for other Social Security supports to which he/she is entitled, as well as to claim alimony and/or the payment of amounts owed to him/her.

### **Duties of all the household members**

They must

- notify the social security services within 10 business days following the date of any change in the household income or composition that may lead to a change in the RSI benefit.
- attend the meetings convened by the Local Integration Service (*Núcleo Local de Inserção*) where the Social Integration Contract is defined, signed and reviewed.
- sign the Social Integration Contract.
- fulfil the obligations set in the Social Integration Contract.
- be available to apply for other Social Security supports to which they are entitled, as well as to claim alimony and/or the payment of amounts owed to them.
- When the Social Security services find that it is necessary to verify the movable assets declared, they may require the applicant or any member of his/her household to submit a statement allowing the access to banking information or, alternatively, to submit any banking documents considered relevant for that purpose.

### **What happens if the RSI beneficiary and the household members do not sign the Social Integration Contract within the established time limit, or do not comply with the Social Integration Contract terms?**

The Social Integration Contract must be signed by the case manager, the RSI beneficiary and, where applicable, the other members of the household, within a maximum period of 45 days after the Social Integration Income benefit granting.

#### **If the RSI beneficiary does not sign the Social Integration Contract**

If the RSI beneficiary refuses to sign the Social Integration Contract without providing reasonable justification and, in the meantime, the benefit payment has ceased, he/she will not be entitled to the RSI benefit during the period of 24 months after the refusal.

#### **If the household members do not sign the Social Integration Contract**

- Members of the beneficiary's household, who refuse to sign the Social Integration Contract without providing reasonable justification, will not be considered as part of that household for the purpose of determining the Social Integration Income, during a period of 12 months; however, their income continues to be considered for the calculation of the RSI benefit amount; and,
- Members of the beneficiary's household, who refuse to sign the Social Integration Contract without providing reasonable justification will not be entitled to the RSI benefit during the period of 12 months after the refusal.

#### **If the RSI beneficiary and the household members do not sign the Social Integration Contract**

- During the period of 12 months after the refusal, and in case of a **subsequent RSI application**, submitted by **any member of the same household or of another household**, the persons concerned will not be considered as part of the same household for the purpose of determining the Social Integration Income; however, **their income** will continue to be considered for the calculation of the benefit amount.

**What is considered a refusal to sign the Social Integration Contract?**

The conclusion of the Social Integration Contract shall be deemed to have been refused when the RSI beneficiary or the members of his/her household:

- miss the meeting scheduled by the competent services to sign the Social Integration Contract and do not provide reasonable justification for that;
- miss the meeting scheduled by the competent services, despite having been notified by registered letter, or any other legally recognized means, namely electronic notification, and do not provide reasonable justification for that within 5 days after the date of the act for which they were summoned;
- do not sign the Social Integration Contract or adopt an unjustified attitude of rejection towards the integration actions proposed during the negotiation process of the Social Integration Contract, considering that these actions are objectively adequate to the physical abilities, school qualifications, training and professional experience of the person concerned.

**What is considered a reasonable justification/justifiable cause?**

Justifiable causes for not attending the meetings scheduled by the competent services are the following:

- Illness of the applicant or of a member of his/her household to whom he/she provides care, certified under the terms provided for in the legal scheme of protection in the event of sickness within the scope of the welfare system, without prejudice to *ex officio* confirmation, at any time, by the disability verification system;
- The person concerned was working or actively looking for a job;
- The person concerned was fulfilling a legal obligation or a duty arising from the Social Integration Contract negotiation process;
- Death of spouse, relatives and kin, in straight line and in collateral line, up to the 2<sup>nd</sup> degree, or up to the 3<sup>rd</sup> degree if they lived in common economy.

Table 1 - Penalty for refusal to sign the Social Integration Contract

The person who refused to sign the Social Integration Contract...		<b>will not be entitled to the RSI</b> (if an application is submitted, it will be rejected)	<b>does not count as a household member</b> (when determining the RSI amount according to the household composition, the weight given to that person will be 0%)	<b>his/her/their income</b> continues to be considered for the calculation of the RSI amount:
	<b>the applicant</b> (as a rule, the RSI beneficiary)	During a period of 24 months	During a period of 12 months	During a period of 12 months



	<b>the household member</b> (another person from the applicant's household)	During a period of 12 months	During a period of 12 months	During a period of 12 months
	<b>the applicant and his/her household members</b> In a <b>new application</b> submitted by any member of the same household or of another household		During a period of 12 months	During a period of 12 months

### **If the RSI beneficiary and the household members do not comply with the Social Integration Contract terms**

If the non-compliance is due to:

1. Unjustified absence or refusal to carry out an action or to comply with a measure provided for in the Social Integration Contract, the following penalties are applied to the RSI beneficiary, cumulatively:
  - he/she will not be entitled to the Social Integration Income benefit for a period of 12 months (i.e. if an application is submitted, it will be rejected);
  - if he/she is a household member in a subsequent application for the benefit, submitted by any member of his/her or another household, he/she will not be considered as part of the same household for the purpose of determining the Social Integration Income; however, his/her income will continue to be taken into account for the calculation of the RSI benefit amount, during the 12-month period in which he/she was not entitled to the benefit.
  
2. In case of unjustified absence or refusal to carry out an action or to comply with a measure provided for in the Social Integration Contract, the following penalties are applied to the household member of the RSI beneficiary, cumulatively:
  - he/she will not be entitled to the Social Integration Income benefit for a period of 12 months;
  - if he/she is a member of a household in a subsequent application for the benefit, submitted by any member of his/her or another household, he/she will not be considered as part of the same household for the purpose of determining the Social Integration Income; however, his/her income will continue to be taken into account for the calculation of the RSI benefit amount, during the 12-month period in which he/she was not entitled to the benefit.
  
3. In case of refusal to accept suitable employment, socially necessary work, a socially useful activity, or vocational training, the following penalties will be applied to the RSI beneficiary, cumulatively:
  - he/she will not be entitled to the Social Integration Income benefit for a period of 24 months;

– if he/she is a member of a household in a subsequent application for the benefit, submitted by any member of his/her or another household, he/she will not be considered as part of the same household for the purpose of determining the Social Integration Income; however, his/her income will continue to be taken into account for the calculation of the RSI benefit amount, during the 24-month period in which he/she was not entitled to the benefit.

**If the RSI beneficiary does not conclude his/her personal employment plan**

– If a household member is responsible for the cancellation of the RSI beneficiary's registration in the Employment Centre, this member will not be considered as part of the same household for the purpose of determining the Social Integration Income; however, his/her income will continue to be considered for the calculation of the RSI benefit amount, during the 24-month period in which he/she was not entitled to the benefit.

Table 2 - Penalty for non-compliance with the Social Integration Contract terms

Person who does not comply with the Social Integration Contract terms					
<b>Cause of non-compliance</b>		<b>Person who does not comply</b>	<b>will not be entitled to the RSI</b> (if an application is submitted, it will be rejected)	<b>does not count as a household member</b> (when determining the RSI amount according to the household composition, the weight given to that person will be 0%)	<b>his/her income</b> continues to be considered for the calculation of the RSI amount:
	<b>Refusal to accept suitable employment, socially necessary work, socially useful activity or vocational training</b>	<b>the applicant (as a rule, the RSI beneficiary) or a household member</b> (another person from the applicant's household)	During a period of 24 months	During a period of 24 months	During a period 24 months

Person who does not comply with the Social Integration Contract terms					
	<b>Unjustified absence or refusal to carry out an action or to comply with a measure</b>	<b>the applicant (as a rule, the RSI beneficiary) or a household member</b> (another person from the applicant's household)	During a period of 12 months	During a period of 12 months	During a period of 12 months

#### D4 – Reasons for the end of the RSI payment

The payment of RSI benefit is suspended if...

The payment of RSI benefit is resumed if...

The payment of RSI benefit ends if...

#### The payment of RSI is suspended in one of the following situations:

- The RSI beneficiary refuses to sign the Social Integration Contract without providing reasonable justification;
- The RSI beneficiary misses or refuses to carry out an action or to comply with a measure provided for in the Social Integration Contract, without providing reasonable justification;
- The RSI beneficiary does not comply with the Social Integration Contract by refusing adequate employment, socially necessary work, socially useful activity or vocational training, without providing reasonable justification;
- 30 days have elapsed after the non-fulfilment of the obligation to notify the competent services (period of 10 business days) of any change of circumstances which may affect, suspend or end the entitlement to the RSI benefit, including the change of residence;
- Whenever the RSI beneficiary or any of the household members has an income higher than the RSI benefit amount, this family will not be entitled to the RSI during a maximum period of 180 days;
- The person concerned is in pre-trial detention or serving a prison sentence;
- The person concerned is accommodated in a state-funded establishment, or provisionally accommodated in social responses of temporary nature and has a defined personal integration plan, or is accommodated in therapeutic communities or inpatient units of the national network of integrated long-term care;
- The applicant does not provide relevant elements for the assessment of continued entitlement to the benefit.

#### Resumption of the RSI benefit payment

As a rule, the RSI payment is resumed in the month following the one in which the social security services become aware that the situation which led to the suspension of the benefit payment no longer exists.

However, in the case of beneficiaries who are accommodated in state-funded establishments, including those who are provisionally accommodated in social responses of temporary nature and have a defined personal integration plan, or are accommodated in therapeutic communities or inpatient units of the national network of integrated long-term care: **the beginning or resumption of the RSI payment occurs in the month of their exit or discharge.**

**The entitlement to the RSI benefit ends if...**

- the conditions for granting the RSI are no longer met. These do not include situations that may lead to the suspension of the benefit payment;
- the RSI payment has been suspended for more than 90 days because the social security services did not receive any communication of changes that would allow the withdrawal of the suspension. In situations where the beneficiary is accommodated in a state-funded establishment, this suspension does not apply.
- the RSI beneficiary or any of the household members has an income higher than the RSI benefit amount for a maximum period of 180 days;
- the RSI beneficiary misses or refuses to carry out an action or to comply with a measure provided for in the Social Integration Contract, without providing reasonable justification;
- the RSI beneficiary makes false statements or practices duly proven threat or coercion actions against an official of the management entity or service competent for the conclusion and monitoring of Social Integration Contracts;
- The RSI beneficiary is sentenced to prison.
- The RSI beneficiary dies.

**Note:** The suspension or cessation of the RSI benefit payment due to the change of the household income or composition does not affect the entitlement to ongoing social integration actions and other actions provided for in the Social Integration Contract, even if they have not yet been initiated.

**Note:** If the RSI beneficiary makes false statements or practices duly proven threat or coercion actions against an official of the management entity or service competent for the conclusion and monitoring of the Social Integration Contract, he/she will not be entitled to the RSI benefit during the period of 24 months after the knowledge of the fact, without prejudice to the reimbursement of unduly paid benefits and to the criminal liability that such actions may give rise.

## **E - Other Information. E1 - Applicable Legislation**

### **Ministerial Order no. 420/2023 of 11 December**

Updates the Social Integration Income (RSI) reference value for 2024.

### **Ministerial Order no. 421/2023 of 11 December**

Establishes the annual update of the Social Support Index (IAS) value for 2024.

**Law no. 13/2023 of 3 April**

Amends the Labour Code and related legislation within the scope of the decent work agenda.

**Ministerial Order no. 298/2022 of 16 December**

Establishes the annual update of the Social Support Index (IAS) value for 2023.

**Law no. 100/2019 of 6 September - Approves the Informal Carer Statute**

Amends Law no. 13/2003 of 21 May, which established the Social Integration Income.

**Ministerial Order no. 22/2019 of 17 January**

Amends Article 31 of Ministerial Order no. 257/2012 of 27 August, amended by Decree-Laws no. 13/2013 of 25 January and no. 1/2016 of 6 January, and Ministerial Orders no. 5/2017 of 3 January, no. 253/2017 of 8 August and no. 52/2018 of 21 February.

Updates the Social Integration Income amount to 43,525% of the IAS amount (435,76€), establishing the RSI reference value for 2019.

**Decree-Law no. 126-A/2017 of 6 October**

Creates the social benefit for Inclusion, extends the solidarity supplement for the elderly to invalidity pensioners and promotes the necessary adjustments in other social security benefits.

**Ministerial Order no. 253/2017 of 8 August**

Amends Ministerial Order no. 257/2012 of 27 August, amended by Decree-Law no. 13/2013 of 25 January, and by Ministerial Order no. 5/2017 of 3 January on the RSI granting.

**Ministerial Order no. 5/2017 of 3 January**

Amends Article 31 of Ministerial Order no. 257/2012 of 27 August, amended by Decree-Laws no. 13/2013 of 25 January and no. 1/2016 of 6 January.

Updates the Social Integration Income amount to 43.634% of the IAS amount, establishing the RSI reference value for 2017.

**Decree-Law no. 1/2016 of 6 January**

Changes the equivalence scale applicable to the determination of the Social Integration Income (RSI) amount to be granted, established in Law no. 13/2003 of 21 May, and updates the RSI reference value indexed to the IAS amount, foreseen in Ministerial Order no. 257/2012 of 27 August.

**Ministerial Order no. 257/2012 of 27 August**

Establishes the implementing rules of Law no. 13/2003 of 21 May, which establishes the Social Integration Income (RSI) benefit and the respective amount.

**Law no. 13/2003 of 21 May, republished by the Declaration of Rectification no. 7/2003 of 29 May, amended by Law no. 45/2005 of 29 August and by Decree-Laws no. 70/2010 of 16 June, no. 133/2012 of 27 June and no. 90/2017 of 28 July**, which also republishes it.

**Law No. 4/2007 of 16 January**

Social Security Framework Law.

## **E2 - Glossary**

### ***Household concept***

In addition to the RSI beneficiary, the following persons living with him/her in common economy belong to the same household:

- Spouse or *de facto* partner for more than two years.
- Adult relatives and kin, in straight line and in collateral line, up to the 3<sup>rd</sup> degree (Parents; Parents-in-Law; Stepfather, Stepmother, Children, Stepchildren, Son-in-law, Daughter-in-law, Grandparents, Grandchildren, Brothers/Sisters, Brothers-in-law/Sisters-in-law, Uncles/Aunts, Nephews/Nieces, Great-grandparents, Great-grandchildren).
- Minor relatives and kin, in straight line and in collateral line (there is no limit to the degree of kinship).
- Adopters, guardians and persons to whom the applicant is entrusted by judicial or administrative decision from entities or services legally competent for that purpose.
- Children and young people adopted and protected by the applicant or by any member of the household and children and young people entrusted to the applicant or to any member of the household, by judicial or administrative decision from entities or services legally competent for that purpose.

**Note:** The household concept used in the means-testing scheme is similar to the domestic household concept, i.e., people living in the same house and bound by family ties. However, there are exceptions. Those who are in any of the following situations are not considered as household members:

- A person bound by a contractual relationship (e.g. the person is accommodated or has rented part of the house).
- A person working for a household member.
- A person who is staying for a short time.
- A person living in the household against his/her will because of physical or psychological coercion or other conduct undermining his/her individual self-determination.

### ***Social Integration Contract***

The Social Integration Contract consists of a set of actions established according to the features and conditions of the RSI applicant and his/her household members and is aimed to encourage family autonomy through work and other forms of social integration.

It includes:

- Social integration actions defined according to the features and conditions of the RSI applicant.
- Social integration supports and measures.
- Rights and duties of the RSI beneficiary and of the members of his/her household who are to be considered in the Social Integration Contract.
- Measures that allow the competent services to monitor the fulfilment of the obligations established in the Social Integration Contract.

When signing the Social Integration Contract, if the RSI beneficiary is able to work, he/she must be available to accept suitable employment, socially necessary work, a socially useful activity, vocational training or other appropriate forms of social integration.

If the Social Integration Contract includes employment actions, promoted by the public employment services, the RSI beneficiaries are required to accept a personal employment plan, which becomes part of their Social Integration Contract.

The Social Integration Contract must be signed by the case manager, the RSI beneficiary and, where applicable, the other members of the household, within a maximum period of 45 days after the Social Integration Income benefit granting.

### ***Common economy***

People are considered to live in common economy with the RSI applicant when they are living in the same household with the applicant and have established a relationship of mutual support and sharing of resources.

The common economy situation continues to be considered when the RSI beneficiary or any member of his/her household is absent from home for a period equal to or less than 30 days, or for a longer period if the absence is due to health, study, professional training or employment situations, of temporary nature, even when that absence started before the date of the RSI application submission.

**Please note:** a person living in a *de facto* relationship for more than two years is also considered a household member.

**Please note:** When determining the RSI benefit amount, children and young people who are accommodated in public or private non-profit social support establishments, financed by the State or by other legal persons governed by public law or private law and public utility, as well as children and young people who are accommodated in reception centres or in guardianship educational or detention centres, are considered separately.

### ***Personal Employment Plan***

It is a co-responsibility instrument established by the employment service and the beneficiary. It includes actions defined and structured according to the beneficiary's profile and specific features, as well as the labour market conditions, in order to integrate the beneficiary into the labour market

### ***Duly complete application***

The RSI application is considered duly complete when all the application form fields (address, date, Social Security Identification Number (NISS), signature, etc.) are duly completed in legible handwriting and the application is submitted with all the necessary documents.

## **Frequently Asked Questions**

### **Do I have to declare the Social Integration Income (RSI) amounts for income tax purposes?**

Answer: No, you do not need to declare your RSI benefit amounts for income tax purposes.

### **I receive the Social Integration Income (RSI). Am I entitled to the Social Benefit for Inclusion (PSI) Supplement?**

Answer: Yes, because the two benefits may be cumulated.

### **I receive the Social Benefit for Inclusion (PSI) Supplement. Is this amount considered for the calculation of the Social Integration Income (RSI) amount?**

Answer: Yes. The PSI Supplement amount is considered for the calculation of the RSI amount.