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# Quarterly Benefit Statistics

U.S. Railroad Retirement Board  
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## Railroad Retirement and Unemployment Insurance Programs

Selected Current Statistics for **January - March 2010**

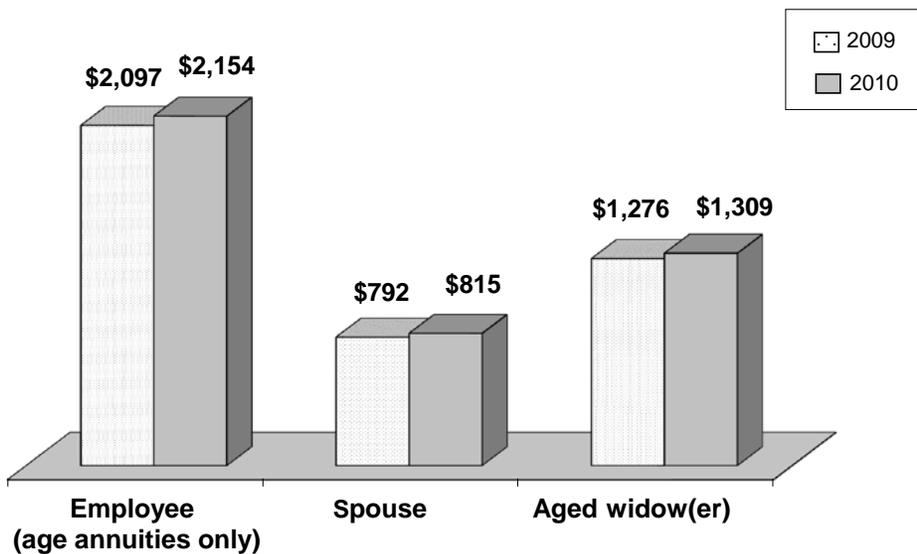
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**List of Tables:**

Table 1 - Retirement and Survivor Programs, Benefit Statistics
Table 2 - Retirement and Survivor Programs, Financial Statistics
Table 3 - Unemployment and Sickness Programs, Benefit Statistics
Table 4 - Unemployment and Sickness Programs, Financial Statistics
Table 5 - Benefits and Beneficiaries

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**Average annuity amounts being paid,  
March 2009 and March 2010**



**Table 1: Retirement and Survivor Programs, Benefit Statistics  
January - March 2010**

Period	Total <sup>1</sup>		Employee annuities			Supple- mental <sup>3</sup>	Spouse annuities	Divorced spouse annuities
	Monthly benefits	Monthly beneficiaries	Age	Disability <sup>2</sup>				
				Under full retirement age	Full retirement age and over			
<b>Number in current-payment status at end of period</b>								
March 2010	677,890	549,154	190,071	48,546	35,059	120,858	132,865	3,837
February 2010	678,615	549,888	190,230	48,544	35,070	120,911	132,921	3,818
January 2010	678,421	549,811	190,040	48,637	35,015	120,845	132,723	3,795
<b>Average amount in current-payment status at end of period</b>								
March 2010	.....	.....	\$2,154.18	\$2,408.87	\$1,931.54	\$41.64	\$814.56	\$497.99
February 2010	.....	.....	2,148.83	2,407.63	1,927.06	41.64	812.68	497.69
January 2010	.....	.....	2,143.80	2,406.14	1,923.62	41.64	810.96	496.17
<b>Number awarded during period</b>								
March 2010	3,448	2,832	861	331	.....	616	905	58
February 2010	3,659	3,038	1,067	238	.....	621	988	54
January 2010	3,846	3,069	1,092	249	.....	777	904	56
10/09 - 3/10	20,013	16,374	5,292	1,547	.....	3,639	5,330	332
10/08 - 3/09	19,342	15,895	4,929	1,549	.....	3,447	5,128	297
<b>Average amount awarded during period<sup>4</sup></b>								
March 2010	.....	.....	\$2,778.73	\$2,432.28	.....	\$41.44	\$946.18	\$495.38
February 2010	.....	.....	2,683.86	2,599.99	.....	41.06	955.14	570.34
January 2010	.....	.....	2,734.02	2,511.47	.....	41.46	978.10	562.08
<b>Benefit payments during period (thousands)<sup>5</sup></b>								
March 2010	\$897,991	.....	\$410,084	\$121,430	\$67,378	\$4,933	\$109,633	\$1,957
February 2010	894,062	.....	408,840	120,095	67,157	5,160	108,844	1,926
January 2010	880,546	.....	400,464	118,031	65,777	5,300	108,841	1,973
10/09 - 3/10	5,366,807	.....	2,446,887	725,544	400,660	30,180	652,558	11,563
10/08 - 3/09	5,188,048	.....	2,341,079	716,876	376,195	30,233	620,638	10,754

<sup>1</sup>Includes dependent parents' annuities. Except for benefit payment data, excludes insurance lump-sum and residual payment figures. Benefit payments also include hospital insurance benefits for services in Canada. <sup>2</sup>Full retirement age, also known as normal retirement age, is gradually increasing from age 65 to age 67 over a 22 year period. For those born 1/2/1943-1/1/1955, the normal retirement age is 66. <sup>3</sup>Excludes supplemental benefits paid to partitioned spouses and partitioned divorced spouses where the employee is deceased. Averages are after court-ordered partitions. <sup>4</sup>Regular employee and spouse annuity averages are preliminary estimates.

**NOTE**--MONTHLY BENEFITS in CURRENT-PAYMENT STATUS at the end of month include all benefits awarded to date and payable for the month. BENEFITS AWARDED consist of those certified for the first time on either a partial or final basis. BENEFIT PAYMENTS for a month, shown in both the benefit and financial statistics, consist of recurrent monthly checks dated the first of the month, plus retroactive and lump-sum payments made during the month, less returned checks (excluding those not yet distributed by Account), refunds of benefits paid previously, etc. Data are on a cash basis (unaudited) and are partly estimated.

**Table 1: Retirement and Survivor Programs, Benefit Statistics  
January - March 2010 -- Continued**

Period	Survivor benefits									
	Annuities						Children	Insurance lump sums	Residual payments	Partition payments <sup>6</sup>
	Aged widows and widowers	Disabled widows and widowers	Widowed mothers and fathers	Remarried widows and widowers	Divorced widows and widowers					
<b>Number in current-payment status at end of period</b>										
March 2010	116,750	4,302	753	4,239	9,499	10,441	.....	.....	637	
February 2010	117,231	4,305	754	4,262	9,497	10,440	.....	.....	597	
January 2010	117,559	4,315	726	4,285	9,451	10,430	.....	.....	564	
<b>Average amount in current-payment status at end of period</b>										
March 2010	\$1,309.44	\$1,098.57	\$1,601.28	\$882.22	\$870.96	\$940.09	.....	.....	\$285.21	
February 2010	1,305.82	1,096.25	1,602.63	881.05	869.04	939.54	.....	.....	284.69	
January 2010	1,302.11	1,094.12	1,597.11	879.91	865.00	938.76	.....	.....	279.34	
<b>Number awarded during period</b>										
March 2010	540	21	8	13	53	41	394	3	.....	
February 2010	522	14	10	15	75	55	321	1	.....	
January 2010	633	19	9	15	61	28	294	1	.....	
10/09 - 3/10	3,070	102	48	73	361	215	1,896	12	.....	
10/08 - 3/09	3,207	85	79	75	318	226	1,868	6	.....	
<b>Average amount awarded during period<sup>4</sup></b>										
March 2010	\$1,728.20	\$1,504.65	\$1,459.84	\$953.23	\$962.37	\$1,278.52	\$909	\$3,422	.....	
February 2010	1,640.65	1,419.26	1,365.14	868.13	1,021.27	1,156.70	909	777	.....	
January 2010	1,666.46	1,456.04	1,701.19	1,150.80	959.25	1,121.36	910	5,455	.....	
<b>Benefit payments during period (thousands)<sup>5</sup></b>										
March 2010	\$153,092	\$4,952	\$1,262	\$3,772	\$8,318	\$10,308	\$371	\$10	\$453	
February 2010	152,999	4,835	1,206	3,786	8,288	10,225	303	1	365	
January 2010	151,262	4,794	1,376	3,759	8,206	9,880	285	5	556	
10/09 - 3/10	923,083	29,137	8,014	22,858	49,897	61,125	1,802	26	3,261	
10/08 - 3/09	921,743	28,708	7,902	22,946	48,264	60,497	1,734	17	189	

<sup>5</sup>January 2010 benefits reflect early transfer in December to CMS of Part B Medicare premiums for January 2010 and transmittal to Treasury of income tax withholding attributable to December benefits. <sup>6</sup>Limited to payments to partitioned spouses and partitioned divorced spouses where the employee is deceased or not otherwise entitled to an annuity. Partitioned payments from employees on the rolls are included with the employees' annuities.

**NOTE**--(Continued from previous page.)

FOR WIDOWS and WIDOWERS aged 60 and over and WIDOWED MOTHERS and FATHERS, the number of benefits being paid and benefit payments include benefits temporarily being continued at spouse annuity rates, pending award of survivor annuities.

INSURANCE LUMP SUMS and RESIDUAL PAYMENTS are each counted only once with respect to an employee's death even though divided among 2 or more persons. Award data for insurance lump sums exclude deferred benefits, i.e., those payable a year after the employee's death.

Data on benefit payments are for CALENDAR MONTHS; all other data are for ACCOUNTING MONTHS ending on approximately the 29th of each month.

**Table 2: Retirement and Survivor Programs, Financial Statistics**  
**January - March 2010 (In thousands)**  
**Cash Basis (Unaudited)**

Item	March 2010	February 2010	January 2010	October 2009 - March 2010	October 2008 - March 2009
<b>RAILROAD RETIREMENT ACCOUNT</b>					
<b>Balance at beginning of period<sup>1</sup></b>	\$465,561	\$529,478	\$588,406	\$418,184	\$632,019
<b>Income, total</b>	437,220	421,627	454,745	2,933,591	2,710,864
Payroll taxes <sup>2</sup>	215,896	150,407	263,197	1,103,975	1,161,472
Income tax transfers <sup>3</sup>	.....	.....	79,000	156,000	98,000
Reimbursements for payment of SSA benefits	110,275	110,047	111,535	661,014	642,037
Transfers from National RR Investment Trust <sup>4</sup>	111,000	160,000	.....	1,008,000	803,000
Transfer from SSEB Account <sup>4</sup>	.....	.....	.....	.....	.....
Undistributed recoveries of benefit payments <sup>5</sup>	-931	228	-10	-552	234
Uncashed check credits from U.S. Treasury <sup>6</sup>	32	37	42	166	204
Interest on investments <sup>7</sup>	948	909	982	4,988	5,916
<b>Outgo, total</b>	503,182	485,545	513,673	2,952,175	2,811,553
Benefit payments-regular <sup>8</sup>	367,978	364,823	375,985	2,187,141	2,106,256
Benefit payments-supplemental	4,949	5,171	5,313	30,252	30,233
Payments of SSA benefits	110,184	110,017	107,092	663,606	641,884
Loans to Railroad Unemployment Insurance Account	13,000	.....	19,100	37,500	.....
Administrative expenses <sup>9</sup>	6,374	5,303	5,746	31,302	31,206
Funding for Office of Inspector General	697	232	435	2,374	1,974
<b>Balance at end of period<sup>1</sup></b>	399,600	465,561	529,478	399,600	531,330
<b>NATIONAL RAILROAD RETIREMENT INVESTMENT TRUST</b>					
<b>Cash and investment balance at end of period<sup>10</sup></b>	\$23,878,678	\$23,009,031	\$22,883,749	\$23,878,678	\$19,083,583
<b>DUAL BENEFITS PAYMENTS ACCOUNT<sup>11</sup></b>					
<b>Balance at beginning of period</b>	\$981	\$902	\$800	.....	.....
Congressional apportionments <sup>12</sup>	5,319	5,368	4,444	\$31,126	\$36,372
Income tax transfers <sup>3</sup>	.....	.....	1,000	2,000	1,000
Vested dual benefit payments	5,197	5,289	5,343	32,022	35,784
<b>Balance at end of period</b>	1,104	981	902	1,104	1,587

**Table 2: Retirement and Survivor Programs, Financial Statistics**  
**January - March 2010 (In thousands)**  
**Cash Basis (Unaudited) -- Continued**

Item	March 2010	February 2010	January 2010	October 2009 - March 2010	October 2008 - March 2009
<b>SOCIAL SECURITY EQUIVALENT BENEFIT ACCOUNT</b>					
<b>Balance at beginning of period</b>	\$849,866	\$949,141	\$797,092	\$803,783	\$791,230
<b>Income, total</b>	528,505	422,925	648,951	3,186,270	3,103,373
Payroll taxes <sup>2</sup>	210,583	148,291	260,603	1,189,924	1,273,603
Income tax transfers <sup>3</sup>	.....	.....	43,000	76,000	58,000
Financial interchange advances <sup>13</sup>	316,390	273,069	343,623	1,911,737	1,762,369
RRB-SSA financial interchange transfer	.....	.....	.....	.....	.....
Interest on investments <sup>7</sup>	1,532	1,565	1,725	8,609	9,402
<b>Outgo, total</b>	523,283	522,200	496,901	3,134,965	3,032,510
Benefit payments <sup>8</sup>	519,867	518,780	493,905	3,117,393	3,015,774
Repayment of financial interchange advances <sup>13</sup>	.....	.....	.....	.....	.....
RRB-CMS financial interchange transfer	.....	.....	.....	.....	.....
Transfer to Railroad Retirement Account <sup>4</sup>	.....	.....	.....	.....	.....
Administrative expenses <sup>9</sup>	3,080	3,308	2,786	16,402	15,725
Funding for Office of Inspector General	337	112	210	1,170	1,010
<b>Balance at end of period</b>	855,088	849,866	949,141	855,088	862,093
<b>ECONOMIC RECOVERY PAYMENTS, AMERICAN RECOVERY AND REINVESTMENT ACT<sup>14</sup></b>					
<b>Balance at beginning of period</b>	\$5,219	\$5,218	\$5,216	\$5,458	.....
Congressional apportionments	.....	.....	.....	.....	\$135,000
Benefits	47	-1	-2	287	.....
<b>Balance at end of period</b>	5,172	5,219	5,218	5,172	135,000

<sup>1</sup>Balances include liabilities for uncashed checks. As of the end of March 2010 liabilities were \$11,720,000. <sup>2</sup>Net of U.S. Treasury adjustments for payroll tax refunds to certain carriers and their employees for prior periods. <sup>3</sup>Amounts include U.S. Treasury adjustments for prior period income tax reconciliations. <sup>4</sup>Under the Railroad Retirement and Survivors' Improvement Act of 2001, as amended, the portion of the RR Account not needed to pay current administrative expenses is to be transferred to the National Railroad Retirement Investment Trust (Trust). The Trust may transfer funds back to the RR Account for payment of benefits. The balance of the SSEB Account not needed to pay current benefits and administrative expenses is to be transferred to the Trust or to the RR Account. <sup>5</sup>Net of amounts distributed by account. <sup>6</sup>Net of returns of uncashed check credits. Includes undistributed canceled checks under 1-year limited payability. <sup>7</sup>Net of adjustments for payroll tax refunds (see note 2). <sup>8</sup>January 2010: SSEB Account benefits reflect an early transfer to CMS in December 2009 of Part B Medicare premiums for January 2010. SSEB and RR Account benefits reflect the transmittal to Treasury of income tax withholding attributable to December 2009 benefits. <sup>9</sup>Reflects adjustments for prior periods. <sup>10</sup>Source: National Railroad Retirement Investment Trust. <sup>11</sup>Total vested dual benefits paid during a fiscal year are limited to the amount appropriated to the Dual Benefits Payments Account for that year. Any amounts not spent are returned to the U.S. Treasury. The benefit appropriation for fiscal year 2010 was \$64.0 million, including income tax transfers. The appropriation for fiscal year 2009 was \$72.0 million, including income tax transfers. <sup>12</sup>Includes a small amount of interest on uncashed checks. <sup>13</sup>Includes interest. <sup>14</sup>The American Recovery and Reinvestment Act of 2009, signed into law on February 17, 2009, provided for a one-time economic recovery payment of \$250 to be paid to most adults (including disabled adult children) who receive railroad retirement benefits. An appropriation of \$135,000,000 for these payments was received in March 2009.

**NOTE.**--Data relate to CALENDAR month.

**Detail may not add to totals shown because of rounding.**

**Table 3: Unemployment and Sickness Programs, Benefit Statistics  
January - March 2010**

Period	Normal benefit accounts			Beneficiaries		
	Applications received	Opened	Exhausted	Total	Normal benefits	Extended benefits
<b>Unemployment<sup>1</sup></b>						
March 2010	662	633	885	10,513	7,068	4,134
February 2010	858	1,365	1,075	12,398	9,675	3,597
January 2010	1,856	1,629	2,696	12,960	12,743	2,376
7/09 - 3/10	20,319	20,794	5,776	23,531	22,490	7,141
7/08 - 3/09	18,547	13,759	1,655	15,563	15,487	539
<b>Sickness</b>						
March 2010	1,578	1,251	431	5,279	4,569	960
February 2010	1,193	924	550	4,933	4,428	807
January 2010	1,258	934	995	5,313	5,257	452
7/09 - 3/10	17,265	13,951	2,345	14,689	14,542	1,643
7/08 - 3/09	17,243	13,735	2,243	14,503	14,336	1,684
Period	Number of payments			Averages <sup>2</sup>		
	Total	Normal benefits	Extended benefits	Benefit days	Benefit per week	Benefit payments (thousands)
<b>Unemployment<sup>1</sup></b>						
March 2010	22,048	13,146	8,902	8.9	\$317.75	\$12,819
February 2010	22,725	16,155	6,570	8.8	318.30	13,546
January 2010	24,750	21,883	2,867	8.5	318.40	13,977
7/09 - 3/10	205,806	166,666	39,140	8.8	316.90	119,197
7/08 - 3/09	75,677	73,266	2,411	8.6	302.75	43,239
<b>Sickness</b>						
March 2010	10,723	8,567	2,156	8.8	\$316.50	\$4,741
February 2010	9,014	7,519	1,495	8.7	317.10	2,993
January 2010	10,506	9,951	555	8.8	317.20	4,883
7/09 - 3/10	92,674	86,012	6,662	8.9	317.65	41,754
7/08 - 3/09	90,033	83,295	6,738	8.9	303.20	36,766

<sup>1</sup> Starting in June 2009, includes temporary extended unemployment benefits authorized by the American Recovery and Reinvestment Act of 2009. Beginning in November 2009, temporary extended unemployment benefits are also being paid under the Worker, Homeownership, and Business Assistance Act of 2009. <sup>2</sup> Benefit days--average benefit days per registration period. Benefit per week=equal to 5 times average daily benefit.

**NOTE**--An unemployment claimant files only one APPLICATION for a benefit year. A sickness claimant files an APPLICATION at the beginning of each period of continuing sickness. NORMAL BENEFIT ACCOUNTS are opened when the first payment is made. The number of BENEFICIARIES is the count of persons receiving unemployment or sickness benefits in the period. Those receiving both normal and extended benefits for unemployment or sickness are counted only once in the total for each type. PAYMENTS generally cover 14-day registration periods. Benefits are payable for days over 7 during an employee's first 14-day registration period. Sickness benefits are paid for days of sickness after the 4th consecutive day of sickness in the first claim in each period of continuing sickness; for subsequent registration periods in the same period of continuing sickness, payments are made for all days of sickness over 4 whether or not consecutive. Unemployment benefits are paid for days of unemployment over 4. However, in the case of unemployment benefits due to a legal authorized strike, unemployment benefits are not paid until after a 14-day waiting period. Non-strikers unemployed due to an illegal strike must also serve a 14-day waiting period.

(Continued on next page.)

**Table 4: Unemployment and Sickness Programs, Financial Statistics**  
**January - March 2010 (In thousands)**  
**Cash Basis (Unaudited)**

Item	March 2010	February 2010	January 2010	October 2009 - March 2010	October 2008 - March 2009
<b>RAILROAD UNEMPLOYMENT INSURANCE ACCOUNT</b>					
<b>Balance at beginning of period</b>	\$20,206	\$25,749	\$7,899	\$38,123	\$105,287
<b>Income, total</b>	13,429	7,781	35,987	78,977	47,818
Contributions	75	7,637	8,572	32,278	34,883
Loans from RR Account	13,000	.....	19,100	37,500	.....
Interest on investments <sup>1</sup>	236	145	33	615	2,961
Undistributed recoveries of benefit payments <sup>2</sup>	117	-1	-22	279	166
Transfers from Administration Fund <sup>1</sup>	.....	.....	8,305	8,305	9,808
<b>Outgo, total</b>	13,278	13,323	18,137	96,744	62,302
Unemployment benefit payments	8,371	10,116	13,164	68,775	36,485
Sickness benefit payments	4,741	2,993	4,883	27,068	24,988
Funding for Office of Inspector General	167	214	91	900	828
<b>Balance at end of period</b>	20,356	20,206	25,749	20,356	90,804
<b>RAILROAD UNEMPLOYMENT INSURANCE ADMINISTRATION FUND</b>					
<b>Balance at beginning of period</b>	\$5,248	\$4,769	\$11,471	\$9,465	\$10,427
<b>Income, total</b>	101	2,231	3,009	10,751	11,485
Contributions	25	2,350	3,009	10,668	11,601
Interest on investments <sup>1</sup>	77	-118	.....	83	-116
<b>Outgo, total</b>	1,547	1,752	9,711	16,412	16,963
Administrative expenses	1,547	1,752	1,406	8,107	7,155
Transfers to RUI Account <sup>1</sup>	.....	.....	8,305	8,305	9,808
<b>Balance at end of period</b>	3,803	5,248	4,769	3,803	4,949

<sup>1</sup> In accordance with Section 11(d) of the Railroad Unemployment Insurance Act, \$8,305,103 was transferred from the RUI Administration Fund to the RUI Account in January 2010. The transfer represents the amount in the RUI Administration Fund in excess of \$6 million (on an accrual basis of accounting) at the end of fiscal year 2009. In February 2010, the attributable interest of \$118,319 was transferred. <sup>2</sup> Net of distributed amounts.

**NOTE.**--(Continued from previous page.)

BENEFIT PAYMENTS are on a cash basis (unaudited) and represent amounts paid during the period including retroactive payments, less recoveries distributed to beneficiary accounts, refunds, and cancellations of previous payments.

ADMINISTRATION FUND balances reflect current adjustments to income and disbursements for previous years.  
 All unemployment and sickness data relate to CALENDAR MONTHS.

**Detail may not add to totals shown because of rounding.**

**Table 4: Unemployment and Sickness Programs, Financial Statistics**  
**January - March 2010 (In thousands)**  
**Cash Basis (Unaudited) -- Continued**

Item	March 2010	February 2010	January 2010	October 2009 - March 2010	October 2008 - March 2009
<b>LOANS DUE RAILROAD RETIREMENT ACCOUNT</b>					
<b>Balance at beginning of period</b>	\$24,604	\$24,548	\$5,409	.....	.....
Loans from Railroad Retirement Account	13,000	.....	19,100	\$37,500	.....
Interest accrued	79	56	39	183	.....
<b>Repayments from UI Account, total</b>	.....	.....	.....	.....	.....
Principal	.....	.....	.....	.....	.....
Interest	.....	.....	.....	.....	.....
<b>Balance at end of period</b>	37,683	24,604	24,548	37,683	.....
<b>EXTENDED UNEMPLOYMENT BENEFITS, AMERICAN RECOVERY AND REINVESTMENT ACT<sup>3</sup></b>					
<b>Balance at beginning of period</b>	\$8,694	\$8,944	\$8,709	\$9,751	.....
Congressional apportionments	.....	.....	.....	.....	\$20,000
Interest and other income	(4)	(4)	(4)	(4)	.....
Benefits	5	250	-235	1,063	.....
<b>Balance at end of period</b>	8,689	8,694	8,944	8,689	20,000
<b>EXTENDED UNEMPLOYMENT BENEFITS, WORKER, HOMEOWNERSHIP, AND BUSINESS ASSISTANCE ACT<sup>5</sup></b>					
<b>Balance at beginning of period</b>	\$170,772	\$173,952	\$175,000	.....	.....
Congressional apportionments	.....	.....	.....	\$175,000	.....
Benefits	4,443	3,180	1,048	8,671	.....
<b>Balance at end of period</b>	166,329	170,772	173,952	166,329	.....

<sup>3</sup> The American Recovery and Reinvestment Act of 2009 (Recovery Act), signed into law on February 17, 2009, contained an appropriation of \$20,000,000 to provide up to 13 additional weeks of unemployment benefits for certain railroad workers who exhaust their rights to the benefits normally provided under the Railroad Unemployment Insurance Act.

<sup>4</sup> Less than \$500.

<sup>5</sup> The Worker, Homeownership, and Business Assistance Act of 2009, signed into law on November 6, 2009, contained an appropriation of \$175,000,000 to extend the provisions of the Recovery Act by one year.

**Detail may not add to totals shown because of rounding.**

**Table 5: Benefits and Beneficiaries -- March 2010**

**RETIREMENT - SURVIVOR**

<b>Total benefit payments - cash basis (unaudited)</b>	\$897,991,000
Regular benefits	887,845,000
Vested dual benefits	5,197,000
Supplemental annuities	4,949,000

	<b>Number</b>	<b>Average</b>
<b>Total benefits being paid at end of month</b>	678,000	.....
Retired employees':		
Regular	274,000	\$2,171
Supplemental	121,000	42
Spouses' and divorced spouses'	137,000	806
Aged widows' and widowers'	117,000	1,309
Other benefits	30,000	935
<b>Total beneficiaries being paid at end of month</b>	549,000	.....

**UNEMPLOYMENT-SICKNESS**

	<b>Unemployment<sup>1</sup></b>	<b>Sickness</b>
<b>Benefit payments - cash basis (unaudited)</b>	\$12,819,000	\$4,741,000
<b>Beneficiaries</b>	10,500	5,300
<b>Average payment per week</b>	\$318	\$317

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<sup>1</sup> Starting in June 2009, includes temporary extended unemployment benefits authorized by the American Recovery and Reinvestment Act of 2009. Beginning in November 2009, temporary extended unemployment benefits are also being paid under the Worker, Homeownership, and Business Assistance Act of 2009.