QUARTERLY ALL EN CALL TRANSCRIPT

June 2025

Derek Shields: Welcome to today's quarterly All Employment Network call. My name is Derek Shields. I'm with the Ticket Program Manager, and I'll be serving as today's moderator. We so appreciate you joining us, and before we begin with our agenda and presentations, I'd like to review a few logistics and housekeeping items. Next slide please.

First, this meeting is being recorded, and the transcript will be provided afterwards. Per the Ticket Program agreement, Part 3, Section 11, subsection I, EN staff are not permitted to record this meeting nor capture the transcript. We do encourage you to ask questions, and we have a few different ways for you to do that. You could use the MS Teams chat section. If joining via phone and you wish to answer a question, this is a two-step process. Please raise your hand using star five and then we'll unmute you and then we need you to press star six. We'll remind you when we're doing our Q&A sessions. If you are joining via MS Teams and you have a question that you would like to ask out loud, please use the raise your hand feature, and our team will ensure your mic is unmuted. We do ask you to limit questions, one per participant, and additional questions can always be submitted to us via email at enoperations@ssa.gov , as just posted into chat. Those questions that we're unable to get to during the live event will be forwarded to the appropriate SSA panelists for response.

A note on closed captioning. Closed captioning is available for participants who join using the MS Teams application or by using the separate closed caption link provided both in that GovDelivery email announcement for today's call and inside of chat. For closed caption inside of MS Teams, to enable that, go to the three ellipses button. That's at the top of the MS Teams window. Click on *more* and then go down the list to select *language and speech*. Once you have that, you can select *turn on live captions*, and you'll be able to follow those automated captions. If you're using the link option, paste the link in your browser of choice, and it will open a separate window to view closed captions. So those are our meeting logistics. And as it says at the bottom, thank you so much for joining us today for this quarterly All EN Call.

I'd now like to review our agenda. On the screen we have the agenda. Obviously, I did the logistics, and we're doing the agenda now. Next, we'll welcome our new ENs to the program, and then I'll be introducing Patrice McLean with Social Security for her opening remarks. Patrice is the acting director of the Employment Support Division. And after Patrice goes, we will hear from Kristine Erwin-Tribbitt. Kristine is here today to provide a presentation and an update on the Payroll Information Exchange. After Kristine is done, she'll be taking questions. So we'll have

a first Q&A session immediately following. Once that Q&A session is done, we'll next hear from Erinn Weidman. Erinn is a Social Security insurance specialist inside the same operation, and we'll hear some important updates from her. Following Erinn, Jayme Pendergraft is with us again today. Jayme is the Ticket Program Manager Communications and Outreach Director, and she'll be providing a few important updates for us there, followed by a second Q&A session. We've scheduled out about 45 to 55 minutes' worth of presentations. We are together for 90 minutes, so we'll have plenty of time for Q&A. And with that, now let's turn to the next slide, and I would like to welcome the new ENs to the program.

Starting from New Jersey, we have two new ENs, BLESSED Ministries Inc., and Saint John of God Community Services. From Florida, we have Alliance Community and Employment Services Inc. In Illinois, we welcome Cornerstone Services Inc. And then the final three to welcome for this call are all from Texas: Spearhead Beyond, Alliance Staffing Group LLC, and Creative Achievements. So we welcome these new ENs to the program and we look forward to the services you'll be providing to support Ticketholders and their employment journeys. With that if we can go to the next slide please.

It is now my pleasure to welcome Patrice McLean. Patrice is the acting director of the Division of Employment Support with Social Security, and she'll provide us some welcoming remarks. Patrice.

Patrice McLean: Thank you so much, Derek. Good day, everyone. And as Derek mentioned, my name is Patrice McLean, and I am the acting director of the Division of Employment Support. There have been a few changes to our organizational structure since our last meeting that I'd like to make everyone aware of today. First, as you may be aware, Congress has confirmed a new Commissioner of Social Security. Frank Bisignano. Frank Bisignano's vision thus far has been to make the Social Security Administration a premier organization with the highest level of service, teamwork, and efficiency. And we look forward to working with him.

Next, two of our former offices, the Office of Employment Support and the Office of Research and Demonstration have merged to become the Division of Employment Support. The beauty of this merge is that in addition to existing employment support programs and processes, we will now have a demonstrations team that designs, implements, and evaluates demonstration projects to test changes to our programs and policies. We've renamed our existing branches to the Payments and Systems Branch, where we process, oversee, and conduct quality assurance on payments to Employment Networks and VR organizations. And then we have our Employment Programs Branch, which will house the demonstration team I mentioned and also administers the Ticket to Work Program, Work Incentive Planning and Assistance Program, and the Protection and Advocacy for Beneficiaries of Social Security Program.

We now also have a Policy and Analytics team that oversees Ticket policy and regulations and oversees division-wide evaluations that affect our programs and associated return to work

policies. Our office now falls under SSA's Office of Law and Policy instead of the former Office of Retirement and Disability Policy.

Before I hand back over to Derek, I want to provide a general EN reminder about Ticket assignments. Per TPA Part 3, Section 2, the EN must initiate the Ticket assignment through the Portal after mutually developing the IWP with the Ticketholder, not before developing the IWP. The TPA further states in Part 3, Section 4D(2)(a) that an IWP is a prerequisite to the Ticket assignment. And I mentioned this because a few ENs have reached out having established IWP meetings with the Ticketholder to find that the Ticket was recently assigned to another EN. And when I say recently, I mean within the last hour or two. And when we conducted research, we found that some of those Tickets had been assigned, but the ENs that had assigned them had not met with the Ticketholder and there was no IWP developed between the Ticketholder and the EN. We understand wanting to hold on to a Ticket in the Portal while awaiting a meeting with a Ticketholder, but the Ticket cannot be assigned in the Portal until there's been a signed and executed IWP that was developed between the EN and the Ticketholder. So just a general reminder to make sure that you are only assigning Tickets in the EN, in the Ticket Portal after there's an assigned Ticketholder, a signed IWP that's been signed between the EN and the Ticketholder. In addition to this reminder, we've prepared some great information that we believe will be helpful to you. So without further ado, I'll hand back over to Derek, who will introduce our next presenter. Thanks, Derek.

Derek Shields: Thank you very much, Patrice. We appreciate your organizational update and the important reminders about Ticket assignments and timing. With that, we'll now proceed for our first presentation. As I mentioned earlier, we have an update today on Payroll Information Exchange. This will be provided by Kristine Erwin-Tribbitt. Kristine is a team leader on the Employment Policy team. Kristine, welcome.

Kristine Erwin-Tribbitt: Thanks. Thanks for joining, everyone. So I wanted to kind of go over what the Payroll Information Exchange is. Next slide. And then let's go to the next slide.

Okay. So we call the Payroll Information Exchange PIE, and it was brought, we got awarded this as part of Section 824 of the Bipartisan Budget Act of 2015. And really what the law did was allow SSA to enter into information exchanges with payroll data providers. As long as we're using the wage data and employment information to improve administration processing and preventing improper payments, we're allowed to enter into these wage agreements. We actually contracted with Equifax to receive wage and employment information for SSDI beneficiaries and SSI beneficiaries. And this also applies to folks that are newly applying, so claimants as well. And then it also extends to deemors. And if you're not familiar with our term, deemors, deemors refer to a person whose income and resources are considered when determining an SSI beneficiary's benefits. Typically, a deemor is a spouse or a parent or another household member whose financial situation can affect the benefit of the primary beneficiary. Under PIE, we receive the wage and employment information on a monthly basis, but we only

receive the prior month's data. So it's not like we get the whole historical drop of wages. We only get the prior month's data. And we did our first exchange in April of this year, pretty exciting for all of us that have been on the PIE team for several, several years. We exchanged 1 million Social Security assessments. That wasn't all of the signed authorizations. We were starting out kind of slow, and each month we're increasing the number of cases we send over to Equifax. We hope to be fully implemented by August. So now let's talk about the PIE authorization. Next slide.

So the PIE authorization, we use the form SSA 8240 to obtain authorization from the beneficiary for us to send their SSN to Equifax for the wage information. We can collect the authorization from both applicants and beneficiaries. If the person files online, the authorization is built into the disability application process. So as long as they're answering "yes, I agree to have SSA reach out to get wage information" that those yes answers are providing us the authorization we need. But for folks that maybe filed several years ago before we started collecting the authorizations, we can request a paper form or they can even just call us and we can attest to the form over the phone. So some of the advantages of the PIE authorization is that it does protect the beneficiary from certain penalties for any errors or for not reporting wages timely. We can also find good cause if the person fails to report or reports a late change in an employer. So there are some advantages other than the big one, where we're automatically receiving the wage information from the employer. So let's say the beneficiary has an active authorization. Next slide.

A beneficiary with an active authorization must continue to report wages and employment information until we, SSA, sends them a notice informing them they can stop reporting. A beneficiary with an active authorization can also revoke the authorization at any time. But they need to understand with revoking the PIE authorization, their reporting responsibilities will continue, and they will have to report their wage information. Once the beneficiary has received a PIE notice telling them they can stop reporting, they will still need to report changes in resources or other income, or if they change employers, or they even return to work. And I like to bring this one up a lot, the return to work, because for SSDI beneficiaries — since we're making an SGA decision — we don't just look at the income being reported, we also look at what they're doing. So if they're on sick and vacation pay for a long period of time, the wage information is going to be coming in to us. But we'll have annotated our records that their person's on sick pay. But if they don't tell us they've actually physically gone back to work, we will not know that information until we do the work CDR, and then they could be overpaid. And it's also important that the beneficiary report any wage or any employment information that is inaccurate. Like for example, if they get the notice saying that that they don't have to report their wages for McDonald's and they said I never worked for McDonald's or the amounts that we have are incorrect, they should notify us immediately about any of those changes. So let's take a look at the PIE notice. Next slide.

So this is an example of a PIE notice where we're telling the beneficiary they can stop reporting for the following employers. I wanted to provide this example of the three employers to point out that when the beneficiary starts with a new employer, they need to report that to us. We have to set up the record with the EIN attached to the employer for us to successfully do the PIE exchange. The notice will explain what responsibilities are still required as I reported earlier about income and resource changes, living arrangements, the return to work.

Next, let's look at the next slide about the resume reporting. So this is outlining when the beneficiary, when we don't start, when we stop receiving information from the payroll provider, we don't have the reasoning why the work stopped or why we're not receiving the wages. It can be several combinations of things. For example, the employer is no longer working with Equifax, or the beneficiary actually did stop working for the employer. Or it could be that the beneficiary has revoked their authorization. So we will send this notice telling them that they need to resume reporting their work activity for the employers that are listed here in the event they're still working for them. Next slide.

Okay, so let's go through the PIE automation, so when the wages come in. Depending on what type of benefit they're receiving triggers different setups for how the wage information is handled. So for SSDI benefits, the earnings data is evaluated by our Work Smart Program. And that Work Smart Program determines whether a work CDR is needed. It looks at different factors like what benefit status they're in, whether they've completed a Trial Work Period, those various things. If we believe the person is working over SGA, we will trigger an alert to the field office for them to start a work CDR. Now, if the beneficiary is receiving SSI, the wage data is sent directly to the SSI record, and the SSI payment is adjusted automatically with no technician involvement. But that only occurs when the EIN is established on the record. Hence the reason why I say it's important for them to report their work when they start with a new employer so that we can get that employer set up on the on the SSI record. Now, there's always mistakes. So in the event that the system can't automatically adjust the benefits, there is an alert that is generated to the field office for them to go in and correct the record.

Okay, so let's go on to the next slide and talk about how you can help us. So first, obviously if you do get any questions from beneficiaries about an authorization, please encourage them to sign it or to reach out to us if they don't think they have a PIE authorization. It's really good to have on hand, even if they're not working so that we can also get the information when they start working and at least reach out to the beneficiary to get more information. If the beneficiary is questioning any information on the notice about the employers, please tell them to report to SSA. Likely what will happen in those types of situations is that we will likely refer you to Equifax, or we will refer the beneficiary to Equifax to correct the issue. If the earnings information, like let's say for example the beneficiary comes back and says well, I didn't work for that employer, so maybe somebody's stolen their identity and working under their SSN. When that happens, Equifax needs to go in and correct the records on their side. So what they do is the beneficiary will have to reach out to Equifax to start that process, and then we will flag

the case and prevent any other wage information to come in until we've resolved the issue so that we're not adjusting benefits based on false information.

Lastly, we really want to remind you to tell the beneficiaries that they still need to report any information about their Work Incentives, Impairment-Related Work Expenses, subsidies, special conditions, sick and vacation pay. None of that information is being sent to us from Equifax. So that information still needs to be reported. The same for SSI, keep reporting Blind Work Expenses or Impairment-Related Work Expenses or anything to do with the Student Earned Income Exclusion. Okay. That's all I have to present as an update. So let me take some questions. Derek, can you help out with that?

Derek Shields: Absolutely, Kristine, thank you. Let's go forward one more slide. And just as a reminder, if you want to participate in the Q&A, you have some options. If connecting in through telephone, it's a two-step process. Press star five, we'll unmute you and call upon you, then remind you to hit star six to unmute yourself. MS Teams, you can answer your question in the chat as a few have done already, or you could use your raise your hand feature and we'll call on you to be unmuted. So with that, let's go with Brittany. Brittany, if you have a chance to bring up a couple of the questions for Kristine that have come into chat.

Brittany: Sure. First question is what happens if SSA is using PIE for an SSI recipient and the populated SSI payment is incorrect? Will the beneficiary be expected to repay an overpayment?

Kristine Erwin-Tribbitt: So overpayment policies are, there are certain exemptions and those kinds of things. So I can't really comment on the actual situation. But what I would recommend is yes, please reach out to the Social Security Office. Let us know what's going on, and we may be able to correct the record and prevent any other improper payments going out. And then they can just file an appeal on the overpayment and likely it will be waived, especially if they're on SSI. But I can't guarantee that all overpayments will be waived.

Derek Shields: Thank you, Kristine. Brittany, let's stay with you for another question from chat please. I know you're still with us, Brittany. You are on mute.

Brittany: Yep, I was talking on mute. Next question. Are the ENs initiating the service at the time of completing the IWP?

Kristine Erwin-Tribbitt: I think I need somebody from the Ticket side to take care of that.

Patrice McLean: Yeah. Thanks, Kristine. I think you said, Brittany, are the ENs initiating service at the time of the, I'm not sure I understand, I'm sorry, go ahead.

Brittany: Yeah, she was saying at the time of completing the IWP. If Sandra could come off of mute and let us know what service she was talking about.

Patrice McLean: And while we wait for Sandra, you can start providing services once the IWP is signed and completed. And also then assign the Ticket to the EN in the Portal. If you provide services prior to an IWP being signed and completed and the Ticket being assigned in the Portal, you may not be able to be paid for those services, which we have seen in the past. And an EN was providing services, and they did not have an IWP. And then they also did not assign the Ticket in the Portal and then wanted to be paid for services provided when there was no agreement that we could use to substantiate a payment. Sandra, I'm not sure if you're still, oh, Sandra said her microphone is still muted. Sandra did you raise your hand?

Sandra: Yes, I'm on. Thank you.

Patrice McLean: Okay, Okay.

Sandra: Yes, thank you. My question is because this is a new service, and it sounds like the beneficiary has to complete the SSA 8240, is that letter coming to the beneficiary directly or for ENs are we having to get them to sign this document at the time that we complete the IWP?

Kristine Erwin-Tribbitt: Oh, okay, yeah. No, you don't. The ENs don't need to complete the form. The beneficiary has to complete the form, and we will reach out to the beneficiary directly when we notice that there is not an active authorization on the record. So anytime we do a work CDR, an SSI redetermination, any of that, we will reach out to the beneficiary when there's no active authorization on file. So the ENs don't need to do anything about the 8240.

Sandra: OK. Thank you.

Patrice McLean: And just in case that created any confusion, the 8240 doesn't have anything to do with providing services through the Ticket Program. The IWP is what I was mentioning. I know you're asking also that the 8240 — which is authorization so that the individual's earnings can be released to SSA. So they're separate forms for separate purposes. You don't need the 8240 to be able to provide services under the Ticket Program to the Ticketholder, but you do need a signed and executed IWP.

Sandra: Okay, thank you. And then my second question is, and I'm new to this so I'm just trying to get a better understanding with this program, you're really tracking your earnings.

Kristine Erwin-Tribbitt: Right, the PIE authorization gives us the authority to obtain wage information from Equifax on a monthly basis, so it provides us pay stub level wage data that we can use to make a monthly determination.

Sandra: Okay. So insofar as the ENs, will we have access to this information because a lot of times we're connecting with the Ticketholder and we have, I know for a fact, for myself, trying to get these pay stub copies to verify their employment. Is there any connection where we could use this particular service to verify their employment?

Kristine Erwin-Tribbitt: So you probably are already using that. Equifax also owns the Work Number, so the Work Number would provide you the same level data that we're getting. We're just getting it through a batch file that we use to put through our systems. But pretty much if you can get the wage data from the Work Number, that's the same wage data we're getting.

Sandra: Okay, and the last question is, will this program take the place of those BPQY reports because mostly every report I get, there's no earnings verification.

Kristine Erwin-Tribbitt: No, it won't replace the BPQYs. The BPQYs has other information on it besides just a monthly breakdown of earnings. So no, you'll still need to get the BPQY when counseling beneficiaries.

Sandra: Okay. So would it verify —

Patrice McLean: Sandra, I'm sorry. I just want to make sure that we save time for all of the other questions. If there's time at the end, we can always circle back to you. So jot down your question in case there's time after we get through a few other things. I wanted to check with Derek. I know you were working with those in the chat and also those —

Derek Shields: Yeah.

Patrice McLean: No problem, Sandra. Thank you for your questions.

Derek Shields: Thank you, Sandra. Thank you, Patrice. Yes, we have a raised hand. Let's go over to Krista. Krista, could you try to unmute Kristen, please.

Krista: I was going to say we have Kristen, if you wanted to go ahead and click on the mic in Teams to unmute yourself and go ahead and ask your question.

Derek Shields: So we'll give Kristen a moment to try to do that.

Kristen: Oh, sorry.

Derek Shields: There you go. We can hear you. Go ahead, Kristen. Thank you.

Kristen: I was making it more complicated than it needed to be. Thank you for this information. My question is actually with the BPQY. Will this wage data from the PIE get populated onto the BPQY as a wage report, or is that wage reporting on the BPQY still only directly from the beneficiary?

Kristine Erwin-Tribbitt: So the BPQY, when the wages come in to us and get posted to the SSI record, it'll show up as verified wages. And I believe the verified wages are displayed on the BPQY. For SSDI beneficiaries, it's a little more complicated because we're making an SGA decision, so it may reflect the raw data. But more likely it'll be an SGA decision we've made after deducting Work Incentives. So you're only seeing what the countable income is for the

SGA decision. But I do know that the wages when they go to the SSI record are on the BPQY is verified wages.

Kristen: Okay. And could I ask a follow-up to that because you said you only get it month to month. So if this started in April and say it's somebody that's on this — if we did a BPQY in July, we might see April, May, June, July. But if they didn't self-report prior to April, we might see no wage data for like February and March. Is that a correct assumption?

Kristine Erwin-Tribbitt: Yeah, you are correct.

Kristen: Okay, thank you.

Kristine Erwin-Tribbitt: And the same would apply too if they newly signed the authorization, let's say today.

Kristen: Yeah.

Kristine Erwin-Tribbitt: You wouldn't see the information until actually probably until August because if it's June and then we get the authorization in, we receive the wages possibly in July. Sometimes it takes more than 30 days to get the record set up.

Kristen: Okay, thank you. Just more questions to ask the beneficiary when I get one. Thank you.

Derek Shields: Thank you for your question, Kristen, and for your response, Kristine. Now let's go back to Krista, who has another raised hand, please.

Krista: Alright. Looks like we have Paul. Paul, your mic should be enabled. Go ahead and unmute yourself and ask your question.

Paul: Hi, thank you. Yeah, so I had a sort of, I guess, a follow-up to that last question. So in terms of billing, so like right now it's the middle of June. If we need a Work Number, we pull Work Numbers kind of now for May, seeing it should bill in the most active claim month. With you all getting wage data from Equifax in the future, is it going to be billed in the sense of like ePay? So quarterly you'll look for established earnings from Equifax and then bill appropriately. I was just curious how it would function.

Kristine Erwin-Tribbitt: Yeah, somebody from the Ticket shop, can you address that?

Patrice McLean: Hey, my apologies. I didn't catch your name. I do know that we are working to make sure that all of SSA's systems are speaking together. So included in the ePay files, and if there aren't already, then we will do our best to make sure that that happens. The ePay files that we receive should include the earnings information that we get from Equifax. We will have to triple check, but I'm pretty sure that that's already established, but we can triple check and make that information available to you guys perhaps in writing.

Paul: Okay, so just going off of that, if that's actually how it will work in the future, once ePay concludes and if we see that a client isn't billed, we can proactively probably pull the Work Number and see if there's any earnings and then bill if there are earnings.

Patrice McLean: Yes.

Paul: Okay, great. Wonderful. Thank you so much.

Patrice McLean: No problem.

Derek Shields: Thank you, Paul and Patrice. Let's go back to Brittany to check chat. I know there's more questions that were in chat. Brittany.

Brittany: Yes. The next question is, what does the PIE automation look like for concurrent beneficiaries?

Kristine Erwin-Tribbitt: Ah, good question. It's handled down the stream separately, but we do share the earnings information across both avenues. So the actual wage information comes into one repository in our systems. And then it's filtered down to the systems that handle the SGA decision versus what changes the SSI benefit. So a technician working either the case or the concurrent case can go to one repository to see all the wage information.

Brittany: Next question. There's two questions actually related to the *my* SSA account. Can a beneficiary see if they have an active PIE authorization through their *my* SSA account?

Kristine Erwin-Tribbitt: That is a good question. I might have to take that one back. I know if they have the notice feature turned on they would certainly get the notices letting them know that we're receiving the wage information. But I don't know whether we send any confirmation of the signed authorization. So let me check on that.

Brittany: Okay. And the other question that went with it, if you want to check on this one as well is, can a beneficiary submit authorization for PIE through their *my* SSA account?

Kristine Erwin-Tribbitt: Yes, I believe they can. I think the form is available through the *my* SSA account. They just would need to look for the 8240, and I believe you can submit it electronically.

Brittany: Another question from the chat. If a consumer is not working during the summer, does she need to inform SSA and then when she goes back in the fall, inform them again? Or will it be okay because the employer remained the same?

Kristine Erwin-Tribbitt: So it probably would be helpful, depending on what benefit they're receiving to let us know they're not working during the summer. And because our system, if we don't receive three consecutive months of wage information, we'll stop the payroll exchange because we're paying for the data. So we don't necessarily want to keep sending the SSN over if

the person's not working for the company more. So I would recommend they report a three-month gap, kind of like that or two-month gap just to ensure that we're aware of that.

Brittany: Another question. It said that Patrice provided many program changes. Are those changes going to be sent to ENs in a notification email?

Patrice McLean: So I know that a lot of what I've mentioned has been put out via — I can't remember — in any case, we will be sending a transcript of today's meeting. So all of the information that I mentioned will be included in the transcript.

Derek Shields: Thanks, Patrice. Yeah, we'll make sure to hit the highlights in the recap summary too. Brittany, thanks for going through the questions in chat. Do you have any more?

Brittany: I do have some more. In PIE, are the earnings distinguished between pay date and pay period?

Kristine Erwin-Tribbitt: So yes, that's the awesome information that we're getting. So it definitely has the pay date. So all the information that's coming in will have the pay date. Most wage information we get from most employers will also include some information that allows us to determine the pay period start date or the start of work. So we will be able to make decisions based on paid versus earned of that terminology.

Derek Shields: Thank you, Kristine. Let's switch over from Brittany back to Krista. So we have another raised hand, Krista. Can you call on that person please?

Krista: Alright, we have an individual from Rutgers Center for Adults. And unfortunately, the title is fully cut off. So Rutgers, if you are ready, go ahead and unmute your mic and ask your question.

Unidentified Speaker: Hello, can you hear me?

Derek Shields: Yes.

Unidentified Speaker: Hello. Yeah, so my question from my EN is where we were in a situation. We were using the Excel sheet provided on the Resources page to try to determine when some of our people were in TWL or SGA. And then we ended up getting a payment because we just reached out personally to EN Services and just asked, is this person eligible? The Excel sheet is saying they aren't eligible. And they said yes, he's eligible. We just need you to send all the Proof of Relationship documentation. So can you just, and it sounds like this Equifax thing might be kind of what I'm asking. Is there a way for the EN to know concretely if we're eligible for a payment? Because right now at least with our understanding, it kind of feels like we're just doing guesswork.

Kristine Erwin-Tribbitt: Patrice, can you help me? This is more of a payment issue than…

Patrice McLean: It is. Yeah. And I don't know that Katie or that anyone from our Payments team is on the line and can answer that question. I can't. I do know that, of course, the expectation is that you're working with your Ticketholders to track their earnings to determine when they might be eligible for payment. But beyond that I'm unable to answer your question. But we can certainly take it back and provide some guidance and thank you for asking. I'm sure other ENs might want to know the same thing.

Alexis: Hi Patrice, this is Alexis.

Patrice McLean: Thanks, Alexis.

Alexis: What it sounds like with these PIE earnings, as long as they post to SSA's record under where the monthly earnings post, these earnings will give you the already proven message in the Ticket Portal. And that's as much as we can tell whether you have a possible viable payment. We can only say possible because our team has to review everything once the payment request comes over. But the Portal will state already proven earnings, which would mean that SSA has earnings on record. So that's as close as we can tell you besides you having pay stubs in hand.

Derek Shields: Thank you, Alexis. And we'll bring that back up to the others. And as I'll mention a little bit later, we do have the All EN Payments Call scheduled for August 5, and this is a time for a return to that question, a deeper dive as well. Let's go back to Brittany. Brittany, we have time for about two more questions before we need to move on with the rest of the agenda. Any other questions appropriate for Kristine, please?

Brittany: Will the earnings that SSA receive update the BPQY?

Kristine Erwin-Tribbitt: So yes, it'll update the BPQY, as long as the earnings state is not necessarily coming directly from Equifax and printing onto the BPQY. It's actually coming from the systems that process the benefit reductions or offsets. But it's my understanding the SSI wages once verified — and they do come in as verified —will post to the BPQY. For SSDI, the wages don't actually post. We're providing you a monthly breakdown of what we've considered the monthly countable income for SGA. So it may just be the earnings for that month, or it could be a little less than what the earnings are because we've deducted some type of Work Incentive to it.

Derek Shields: Thank you, Kristine. And another question, Brittany.

Brittany: One more question. Will these PIE earnings be used for Ticket payments through batch payments?

Kristine Erwin-Tribbitt: Alexis, can you answer that one?

Alexis: Hi, in the same way that I mentioned previously, that as long as these earnings are posted to our monthly earnings source, then the Payments team will be able to use those earnings.

Derek Shields: Thank you, Alexis, and thank you, Brittany. And thank you, Kristine, for your presentation and for responding to all of these questions today. Kristine, are you going to be with us through the end of the 90 minutes?

Kristine Erwin-Tribbitt: I think so.

Derek Shields: That would be great because we might have some follow-up questions that we'll have you back for the second Q&A. So appreciate that. For now, let's move forward to the next slide please. And keep your questions coming into the chat or join the raise your hand. We will have a second Q&A after we hear from our next two presenters. It is now time to move forward to our next segment, and I'm pleased to introduce Erinn Weidman. Erinn is a social insurance specialist in the Division of Employment Support, and she has some important updates to share. Erinn.

Erinn Weidman: Good afternoon, everyone. I have just two reminders for you today. The first one is on June 9 —

Derek Shields: I'm sorry, Erinn. I don't mean to interrupt, but I think we have a slide for you. Is that correct?

Erinn Weidman: I believe we do. Okay, great.

Derek Shields: There we go.

Erinn Weidman: I wasn't 100% sure that it was included. So okay, great. So yeah, so on June 9, we began the second employment verification for the 2025 calendar year, the first one being part of that Security Awareness Certification collection. So the employment verification process ensures that SSA has up-to-date contact information and ensures that Portal users maintain access to the Ticket Portal. So it's important that you complete the employment verification before the deadline, which is tomorrow, June 18. So failure to complete the employment verification before the deadline could result in your Portal users being locked out of the Portal. Nobody wants that, so please complete the employment verification before the deadline. My next and final reminder is to please, if you have not done so already, review your provider information on Find Help. We sent out a GovDelivery message on May 27, I believe, letting you know that we updated Find Health based on the 2025 Annual Performance Outcome Report or APOR data. So if during your review you find that any of your provider information needs to be updated is not accurate, please submit a TPA Change Form to EN Service. And that is all I have for you guys today. So back to you Derek.

Derek Shields: Thank you very much for those reminders and updates, Erinn. We appreciate that. And we'll have Erinn back in just a little bit for our second Q&A if anyone has any specific questions on those Find Help and employment verification updates.

Let's go to the next slide please. It is now time to hear some communications and outreach updates. Jayme Pendergraft is returning to this All EN Call. Jayme is the TPM Director of Communications and Outreach, and she'll be sharing some important communications updates for you. Jayme.

Jayme Pendergraft: Thanks so much, Derek. Can we go to the next slide please? Hi everyone. Many of you have heard me mention our series of short videos that highlight the Ticket to Work Program, other Work Incentives and tips for Ticketholders. These videos provide clear, accessible information to help Ticketholders explore their options for returning to work or working for the first time. They're now available on the Choose Work website, and we would appreciate your help in getting the word out. And today I just wanted to share a couple of details about the videos. Next slide please.

So far, they're doing very well in terms of engagement and performance. They've been viewed almost 4,600 times across all platforms. And they've also been our top performing social media posts over the last two months, driving high engagement and interest.

On our next slide, I list the top three most watched videos, and they are "What is Ticket to Work?", which explains the program and how it helps beneficiaries return to work; "Working While Receiving Disability Benefits", which covers how employment impacts benefits; "FAQs about Working While Receiving Disability Benefits", which answers common questions about work and benefits. Next slide please.

Now I'd like to cover how you can use these videos. They're a great tool to educate beneficiaries. You can share the videos and presentations, webinars, or in one-on-one meetings to explain Ticket to Work, Work Incentives, and how work affects benefits. They can also enhance your social media and outreach. You can post videos on social media, websites, or newsletters to reach a broader audience with this clear, accessible information. We would appreciate it if you link to Choose Work if you do share. Next slide please.

They're also a great resource for your community partners. You can use the videos to support community events as visual aids during job fairs, disability resource events, and workshops to engage attendees and simplify complex topics in a short timeframe. You can also share the videos with your partners and staff to educate folks about Ticket to Work in a very broad sense. You can provide them to your staff, VR agencies, and other service providers to help them educate beneficiaries as well. You can view all of these videos at choosework.ssa.gov/videos. And we'd love any feedback you have, and if you need anything to help you share them, please do reach out to us. Next slide please.

Changing gears a little bit, I'd like to talk about our next Work Incentive Seminar Event. We'd love for you to promote and join us for our WISE webinars on the fourth Wednesday of every month. Our next WISE webinar, "What is Ticket to Work?" is on June 25, 2025, from 3:00 to 4:30 p.m. Eastern. And it provides an overview of the program and introduction to the Employment Team. The webinar will describe available resources that support Ticketholders on their job search, how to get started with the Ticket to Work Program, and how Ticket Program service providers can support Ticketholders throughout their job search and employment. We'd greatly appreciate your help in promoting this webinar to the people you serve. Please share this opportunity via email, on your website, and on your social media channels. Yesterday we sent out a GovDelivery announcement that included sample social media posts for your use. As a reminder, please be sure to tag us at Choose Work on Facebook and at Choose Work SSA on X. If you don't want to use those posts, you can also just share our posts with your audience. Log on to your social media accounts, find us, and click share. By promoting our free June 25, "What is Ticket to Work?" webinar, you're offering your clients valuable resources that will directly contribute to their success and in turn your success as an Employment Network. We're also happy to share that we have restarted our WISE on Demand page and the May webinar, "Presenting Your Best Self to Employers" is now available. We'll be updating the WISE on Demand page located at choosework.ssa.gov/wise with new webinar content every month. Next slide please.

Just a few communications and outreach reminders. We share a wide range of valuable content on social media, and we'd love for you to follow us and share our posts. If you manage social media accounts, you know how challenging it can be to keep up with the consistent posting schedule. So take advantage of our content to help keep your audience informed and engaged. On Facebook, you can find us at Choose Work. On X, you can find us at ChooseWorkSSA. We're also always on the lookout for success stories. If you've worked with a Ticketholder who would make a great candidate, we'd love to hear about it. You can submit leads to ttwstories@ssa.gov. This is a new email address. And remember not to include any personally identifiable information in your email. Our success story manager, Kimberly Childs, will follow up to learn more about your story.

These stories highlight the impact of your services and celebrate the achievements of Ticketholders, and they're one of the best parts of our content development. We love hearing stories from all of you and from the Ticketholders. And then finally, we do encourage you to submit blog ideas. If there's anything you'd like us to publish, any questions you're receiving from Ticketholders that you think might be useful to have a resource handy to provide answers to them, send us an email at ttwsocialmedia@ssa.gov. And we might be able to point you in the direction of a blog we've already published, or we might be able to develop a blog post based on your suggestion. And that brings me to the end of my content. Back over to you, Derek.

Derek Shields: Thank you, Jayme and the Communications Outreach team for this work. It's great to have the updates on the new videos. We're looking forward to the WISE webinar and

appreciate the note about the relaunch of the WISE archives, and importantly, the information that was dropped in chat to connect on socials and success stories and blogs. And with that, if we could proceed to the next slide.

As advertised, we have our second question and answer session, and we could revisit our first topics along with the content provided by Erinn and Jayme. A reminder to raise your hand if you called by phone use star five, we'll unmute you and then you need to press star six. If you're on the MS Teams platform, you could use the chat feature as many have done, or you could use the raise your hand feature and we will have Krista unmute you. We do encourage you to state your first name, your EN name, and then ask your question. And as Patrice mentioned, we try to get around to everybody. So if you've already asked a question, please try to allow others to go. If we get to a point where we don't have much action, feel free to ask a second question. One other note, as mentioned, the All EN Payments Call is scheduled for August 5. We do encourage you to keep payments related questions for those All EN Calls. While we do understand some of the information around the Payroll Information Exchange has led you to think about connections to payments, so that's understandable. With all that, I see we have a raised hand, so I'll ask Krista to help unmute and get that question answered.

Krista: Alright, Kristen, your microphone should be enabled. Go ahead and unmute yourself and ask your question.

Kristen: Hi, thank you. So the videos are great. I love it because I know there was some on YouTube before. So when I'm reviewing them, there are two for SSDI beneficiaries like the Trial Work Period and working while receiving disability benefits. But I don't see any as an intro for SSI beneficiaries like how work is that impact. Is there a plan for that in the future?

Jayme Pendergraft: Hi there. We developed the videos based on some of our most popular topics that we had available on the website. So we do have a lot of different fact sheets and other information that we developed the videos from. Currently there are no plans to do more videos, but I will definitely take that suggestion back and look into possibly doing some sort of fact sheet or resource for that audience.

Kristen: Thank you. I only ask that as that's my biggest overpayment with SSI beneficiaries is they go to a place like this and then even though it says, "if you're receiving SSDI", but they take it as for them. And so they think they have this nine-month Trial Work Period and so forth, and it doesn't apply to them. So they end up being an overpayment situation.

Jayme Pendergraft: Thanks for that feedback. We're very careful in our content to make sure we're specific about who we're writing for, and we will definitely take that feedback and see what we can do in the future as well.

Derek Shields: Thanks for that question and thank you Jayme for the response. Let's go over to Brittany to check in on questions from chat. Brittany.

Brittany: Yes, we have two PIE-related questions. Do PIE earnings get posted to a child auxiliary SSA record, or do they get posted to the NH SSA record? That question was from Karen if we need clarification.

Kristine Erwin-Tribbitt: So the wages do post to the child, yes, that is correct.

Brittany: And the second question. How does PIE capture self-employed Ticketholders' wage earnings or wage information?

Kristine Erwin-Tribbitt: Great question. So it doesn't; Equifax is only working with employers. So our only avenue to capture self-employment data is through the beneficiary or through our IRS data agreement. The IRS earnings contain self-employment work.

Derek Shields: Thank you, Kristine. Brittany, let's stay with you. It looks like Trip has placed a question in the chat.

Brittany: Yes, Trip asked with the PIE program, will SSA be accepting wages from 1099 or contractor positions? And if so, can ENs submit those types of pay stubs to TPM when requesting payments?

Kristine Erwin-Tribbitt: So 1099 income is difficult because 1099 generally means that they need to a file self-employment tax return. And our policies on self-employment income require us to, especially for SSI, we have to wait until the year closes, see what their net earnings from self-employment are after they've deducted all their expenses. And then we use that to distribute the earnings over the period worked. Similar for SSDI. The 1099 does provide us a lead that we know they're working, but we can't necessarily make a decision. An SGA decision just on that 1099 income we have to kind of wait for them to do their necessary tax returns and deduct their expenses to come up with the true net earnings from self-employment.

Brittany: Thank you. We had another question come in from Sandra. Is there a way for ENs to use the Work Number or Equifax for free?

Kristine Erwin-Tribbitt: I don't know how to answer that. I think that Equifax sets those policies on what they charge and stuff, so there's nothing from our standpoint that we could offer.

Brittany: Those are all the questions from the chat at the moment, Derek.

Derek Shields: Thank you, Brittany, and thanks for being with us still, Kristine. Appreciate your time to answer the questions as they come in. We have plenty of time left during the second Q&A session for any other questions that you have. If you have asked a question and we're not hearing from anyone else, please feel free to ask a second question at this time. Feel free to drop your question in the chat or use your raised hand. Brittany and Krista will help facilitate us getting those to our presenters. It looks like we had a question come in. Brittany.

Brittany: Yes, Amanda said, if SSA is not able to get earnings from Equifax for over three months, will they notify the Ticketholder that they will now have to start reporting wages monthly?

Kristine Erwin-Tribbitt: Yep, that's the resume reporting notice that was in the PowerPoint slides. So yes, if we don't receive any wage information from Equifax for three months, then we will send the notice to the beneficiary, telling them that they need to start reporting for the employers listed in the notice if they're still working for them.

Derek Shields: Thanks for the question, Amanda.

Brittany: Another question that popped in the chat. Will the PIE function help to validate earnings that can reduce or eliminate EN overpayments? Or if you can identify what is used to determine overpayments.

Patrice McLean: I think that's a question we can save for the All EN Payments Call. And PIE earnings we're going to treat the same way you would treat any other earnings. So they're not going to have an impact on overpayments any differently than if we'd received those earnings directly from another source.

Derek Shields: Thank you, Patrice.

Patrice McLean: Sure.

Derek Shields: So again, that All EN Payments Call is on August 5, so we can revisit that. But most importantly, the information is not going to change how overpayments occur, just a different source of that information as Kristine has provided in her presentation. We do have time for other questions. Please feel free to drop them in chat or raise your hand. Brittany, looks like we have another question.

Brittany: Yes, Gloria asked, what is the cutoff age for Ticketholders to be in the Ticket Program? I have a couple of Ticketholders who are now two years past the age of 64 and is still on the Ticket to Work Program.

Patrice McLean: So if a Ticket is already assigned before the individual is 64, that Ticket can remain assigned. Once it's unassigned, you can't reassign it. And if someone has already attained the age of 64, their Ticket is no longer assignable. But if they're in the Ticket Program and working with an EN prior to the age of 64, their birthday can come, and they can continue working. You can continue working with them through the Ticket Program.

Derek Shields: Thank you, Patrice, for providing that, 18 through 64. But if the Ticket is assigned, it stays assigned. They could remain in the program. And Gloria has responded, okay, thank you.

Patrice McLean: No problem, Gloria.

Derek Shields: So it looks like Alyssa has raised her hand.

Krista: Alright, Alyssa, you should be enabled. Go ahead, ask —

Alyssa: Yes, hi, can you hear me?

Krista: Yes.

Alyssa: Okay, so we are the Gen X Services Employment Network. I was just researching that whole thing about what is the eligibility for the Ticket Program. And what I learned last week was that for SSDI, if they're already, and it's not age 64, it's age 65. So it's 18 through 64. So 64, they're still fine to join. Once they hit 65, I was always under the impression that they aged out of the Ticket to Work Program because it was only eligible 18 through 64. What I learned last week is that if it's SSDI and they joined the program before age 65, they can continue in the program until full retirement age. But for SSI, 65 is the cutoff.

Patrice McLean: I'm sorry, I didn't catch your name, but that's helpful to hear. We can provide some written guidance on that. So let us take that back and just make sure that we have the clearest guidance that can provide that to everyone. And thank you for providing that.

Alyssa: Okay, thank you.

Derek Shields: Thank you, Alyssa, for the question. And we'll capture that and be back with some guidance. We're making our way through our second Q&A, but the questions are starting to slow down a little bit. Just a reminder, we'll take another minute here, see if we can get a final question. Feel free to use chat or raise your hand as you've been doing. In the meantime, Kristine, you've been able to have a healthy exchange after your presentation on the Payroll Information Exchange and kind of the new process. Any closing thoughts that you have for our attendees today on some of the content you've shared?

Kristine Erwin-Tribbitt: No, not really.

Derek Shields: You're all good? Okay.

Kristine Erwin-Tribbitt: I hope I didn't confuse anyone.

Derek Shields: No, we appreciate you being here with the important update and seeing how the Payroll Exchange is going to be able to provide one less requirement for those Ticketholders that are participating. So for any updates, where do we go to get the updates? I do not receive any information on PIE and wondering what I am not getting. Would those updates be coming through All EN Calls and GovDelivery emails or any other source?

Kristine Erwin-Tribbitt: Yep, pretty much. Right now, the update… it's been so long. PIE has been in the works for years. And so the update was really just to let you all know, because I know the Commissioner, I think, announced that we had implemented PIE. But just to provide

you an update on when we would be fully sending over every SSN. If everything continues to go smoothly through August, there should not be any updates unless we hear of any issues or problems with the wage data.

Derek Shields: Thank you, Kristine. And from Amanda. PIE is applicable to all beneficiaries, not just Ticketholders, correct?

Kristine Erwin-Tribbitt: That is correct. It's for everyone as long as they sign the authorization. They do have to sign the authorization in order for us to send their SSN over to Equifax to get the monthly wage data.

Derek Shields: Thank you, Kristine. Alright. Well, we're not having any other questions come in at this point. We do have a couple of topics or questions that came up that we'll have some follow-ups on. And as Patrice mentioned earlier, we'll have the transcript along with the recap summary hitting the high points of the program. I'll just read out a response Alexis has posted in chat. Tickets go through age 65 or full retirement age depending on the program the beneficiary is under. The Ticket will also terminate at that point. So again, we will ensure that that comes out in the transcript and the recap as well. Thank you, Alexis.

Okay, at this time, if we can go forward to the next slide, please. We appreciate you being with us for the second quarterly, All EN Call. we wanted to give you an advance notice that the next All EN Call is scheduled for Tuesday, September 16, at 1:00 p.m. Eastern Time. That will be scheduled for 90 minutes. And as always, we encourage you to submit your suggestions for topics for the All EN Calls via email, sending that to enoperations@ssa.gov. We also have some other upcoming events that we'd like to make you aware of. As Jayme mentioned during her session and as posted in chat, on June 25, the next WISE webinar is scheduled. This is "What is Ticket to Work?" And please keep supporting the outreach effort to have as many beneficiaries and Ticketholders attending. On July 9, we have our next EN Essentials. We're excited to be planning this one right now. It's entitled "Collaboration Plus: Connecting the Dots to Provide a Continuum of Services for Ticketholders." We'll be looking at having some ENs and VR with us, and we're excited to talk about the other community partners they're working with to ensure a strong continuum of services. And on August 5, as we've mentioned a couple of times, it's the next All EN Payments Call. So put those on your calendars. If you're unsure where to find all this information, please go to the Your Ticket to Work website under the Training and Events section. You'll be easily able to find the 2025 calendar with all of these dates and the rest of the calendar of activities through the end of December 2025.

We do have a note around GovDelivery messages on this slide as well. The Ticket Program shares important information with service providers through GovDelivery, including Ticket Portal issues and outages. Please save this email address, Tickettowork@subscriptions.ssa.gov, to ensure those messages are not going into spam or junk email boxes but it is received as an

approved sender. And with that, we thank you for attending today's All EN Call. We hope you have a good rest of your day. This call has now concluded.