



QUARTERLY ALL VR CALL RECAP JULY 8, 2025

TPM Welcome, Agenda and Logistics

Keitra Hill – Call Moderator (TPM)

Keitra welcomed everyone to the call, reviewed the agenda, provided logistics, and shared the announcements below.

Announcements

Employees listed as VR contacts with SSA should have received the following GovDelivery messages:

- **May 27** – VR Post-Employment Reimbursement
- **June 11** – Pre-Employment Transition Services Kickoff Materials Now Available.
 - Instructions for submitting Pre-ETS claims were attached to the message.
- **June 13** – Virtual VR Cost Reimbursement Training Materials Now Available.

Presentations for the May 20, 2025, Virtual Cost Reimbursement Training and June 2, 2025, Pre-Employment Transition (Pre-ETS) Kickoff are now available on the Your Ticket to Work Events Archive page under [National Calls - Specific Topics](#).

Pre-Employment Transition Services (Pre-ETS) Updates and Reminders

Shada Roper (SSA)

Shada provided information on the Pre-ETS rollout, required documentation, claim submission instructions, and order of cost.

Pre-ETS Full Rollout

Effective June 2, 2025, SSA expanded the current VR Cost Reimbursement policy to reimburse VRs providing Pre-ETS to youth ages 16 and 17, allowing Pre-ETS reimbursement to all VRs.



These 16 and 17-year-olds must:

- Receive Social Security Disability Insurance (SSDI) or Supplemental Security Income (SSI).
- Have received services from the VR that led to the beneficiary attaining a continuous period of Substantial Gainful Activity (SGA).

Reimbursable Service Codes

Service Description	RSA Service Code	SSA Service Code
Work-based Learning Experiences	37/103	37/103
Job Exploration Counseling	97	97
Counseling on Enrollment Opportunities	109	109
Workplace Readiness Training	115	115
Instruction in Self-advocacy	121	122

Pre-ETS: Required Documentation

VR agencies are required to provide the documentation listed below with their claims:

- Signed Service Agreement Plan, IEP or 504 plan
- Signed IPE and amended IPEs
- Signed SSA-199 listing the itemized cost for Pre-ETS
- Authorization and proof of payment for the Pre-ETS cost
- VR agencies should have this documentation ready to submit with the claim.

Claim Submission Instructions

- For Pre-ETS supplemental or initial claims: The Net Payment Period (NPP) will be the service agreement date or the entitlement date, whichever is later.
- In the Remarks section of every Pre-ETS claim:

- Write “Pre-ETS”;
- Provide the Service Agreement/IEP/504 plan date; and
- Provide the proof of earnings (e.g.: quarterly earnings/VR CER/faxed).

For Initial Claims:

- Replace the value you would normally enter in the “Date client entered VR” field with the service agreement date. This will allow you to accurately enter your costs using dates prior to the VR Enter Date.
- The VR Period for the initial claim for Pre-ETS cannot be between a previous period of VR that was already paid.
- The SSA-199 submitted with the Pre-ETS claim should have the date, amount and exact Pre-ETS code next to the reimbursable cost listed on the receipt.
- The cost tab must mirror what was claimed on the SSA-199 and match the receipt.

For Supplemental Claims:

- Do not change any dates.
 - The SSA-199 submitted with the Pre-ETS claim should have the date, amount and exact Pre-ETS code next to the reimbursable cost listed on receipt.
 - The cost tab must mirror what was claimed on the SSA-199 and match the receipt.
- Submit all documentation related to the Pre-ETS cost along with the claim.
- Do not create separate cover sheets for each document. Fax all of the documentation together using the image type “Other”.
- SSA will only accept Pre-ETS supplemental claims based on initial claims paid after **May 1, 2023**.

Order of Costs

For initial claims:

NOTE: This is for a new initial claim for Pre-ETS cost reimbursement.

- Enter the Pre-ETS costs first, then all other direct costs you are requesting.



For supplemental claims:

- Only enter Pre-ETS costs.

Send questions regarding Pre-ETS to VR.Helpdesk@ssa.gov.

Payroll Information Exchange (PIE) Implementation

Kristine Erwin-Tribbitt (SSA)

Kristine Erwin-Tribbitt provided details of the Payroll Information Exchange (PIE) Implementation.

Background

- Section 824 of the Bipartisan Budget Act of 2015 authorizes SSA to enter data exchanges with payroll data providers.
- SSA contracted with Equifax to receive automated wage and employment information for SSDI beneficiaries, SSI recipients, and deemors.
- Wage and employment information is received monthly while the authorization is active (receive prior month's data).
- Successful exchange began in April 2025 with one million SSNs.

PIE Authorization

- **Authorization Form (SSA-8240)**
 - SSDI claimants/beneficiaries, SSI claimants/recipients, SSI deemors, and SSI ineligible children.
 - Collected at initial claims and post-entitlement events (work CDRs, SSI redeterminations, age 18 redeterminations, medical CDRs etc.).
- **Advantages of signing the SSA-8240 Form:**
 - Some individuals are protected from certain penalties for errors or omissions in the information provided by the Payroll Data Provider (PDP).
 - Good cause will be found if a participant fails to report or reports late a change in employer (unless participant revokes the authorization).
- **Individual has an active authorization:**

- Must continue to report their wage and employment information to SSA until they receive a notice informing them that we are receiving the information through PIE.
- May revoke the authorization.
- **Individual has received a PIE notice:**
 - Continue all other reporting requirements (e.g., changes in living arrangements, changes in resources or other income, medical condition improves, changes in employers, return to work).
 - Notify SSA if wage or employment information is inaccurate.

PIE Notice – Stop Reporting

Kristine shared a sample PIE Notice that included the following text:

“As part of our Payroll Information Exchange (PIE), we are now receiving wage and employment information about you from the following employer(s):

- Goodwill
- Nice to Meat You Butcher
- Joe’s Pizza

If the employer(s) listed above is incorrect or there are any concerns about the information, please contact us right away.

You do not need to report wage and employment information from the listed employers.”

PIE Notice – Resume Reporting

Kristine shared a sample PIE Notice that included the following text:

“We previously notified you that we were receiving your wage and employment information as part of our Payroll Information Exchange (PIE). We have not received any information through PIE for the following employer(s) since January 2025:

- Goodwill
- Nice to Meat You Butcher
- Joe’s Pizza

You must report if you have updated your employment information with us, or if you work or received wages from the listed employer(s) after January 2025.”



PIE Automation

Social Security Disability Insurance (SSDI)

- Work Smart will evaluate the wages we receive from the PDP, and
- Prompt a technician to conduct a work CDR if earnings indicate a completed TWP or SGA after the TWP.

Supplemental Security Income (SSI)

- Wages received are sent directly to SSI record and SSI payment adjusted automatically (if EIN established).
- Alerts generated when automation is not successful.

How Can You Help?

- **Encourage beneficiaries to provide authorization (SSA-8240):**
 - SSA technician may request authorization in person, over the phone, via electronic submission request, or using the form via mail.
 - SSA-8240 may be sent with other forms (SSA-821/820).
- **Explain PIE notices:**
 - Continue to report changes in living arrangements, changes in resources or other income, medical condition improves, change in employers, return to work.
- **Inform beneficiaries to report issues with earnings (i.e., individual is not working for the company):**
 - Due process and Notice of Planned Action (NOPA) will provide contact information to dispute information with Payroll Provider.
 - Case will be flagged when data is disputed; no earnings from PIE will be posted.
- **Remind beneficiaries to report work incentives:**
 - SSDI - report impairment-related work expenses (IRWE), subsidy/special conditions, sick/vacation pay-not working.
 - SSI - report Blind Work Expenses/IRWE, student earned income exclusion.

Links to PIE public materials:

- [Social Security Publishes Proposed Rule for Payroll Information Exchange to Reduce Improper Payments | SSA](#)
- [What is payroll information exchange and how does Social Security use it? | Frequently Asked Questions | SSA](#)
- [SSI spotlight on the Payroll Information Exchange \(PIE\) | Supplemental Security Income \(SSI\) | SSA](#)

Questions and Answers

A question-and-answer period followed, which is part of the call recording.

Top Payment Denials – 2nd Quarter of 2025

Keitra Hill (TPM)

Keitra shared information on the top three payments denial reasons for the 2nd quarter of 2025, including the denial descriptions and tip(s) to avoid the denials.

Top 3 Payment Denial Reasons

Denial Code	Denial Reason	2Q/2025 Total
220	8 Months or Less of SGA	282
320	9 Months of SGA But Not Within 12-Month Period	253
620	Untimely Filing	516

Description and Tips to Avoid Denials

Denial Code	Denial Reason	Description	Tips to Avoid Denial
220	8 Months or Less of SGA	8 months or less of verified SGA level earnings were found in SSA's records.	If an initial claim was denied due to insufficient earnings, please wait an additional six months to submit a

Denial Code	Denial Reason	Description	Tips to Avoid Denial
			reconsideration claim to avoid another 220 denial.
320	9 Months of SGA But Not Within 12-Month Period	9 Months of SGA were found in SSA's records, but the 9 months are not within a continuous 12-month period.	<p>Check quarterly wage information to determine if SGA level earnings are identified in 3 out of 4 quarters.</p> <ul style="list-style-type: none"> If not, the SVRA must provide verifiable documentation of SGA level earnings in 3 out of 4 quarters. <p>If an initial claim was denied due to insufficient earnings, please wait an additional two quarters to submit a reconsideration claim to avoid another denial.</p>
620	Untimely Filing (Initial Claim)	The initial claim was filed more than one year from the last month of SGA.	Review the earnings provided on the Vocational Rehabilitation Client Earnings Report (VRCER) to ensure you file the claims no more than one year from the last month of SGA.
620	Untimely Filing (Earnings Reconsideration)	The reconsideration claim for an earnings denial was filed more than one year from the decision date.	Review the notice of determination from the initial claim to ensure you file the reconsideration no more than one year from the decision date.
620	Untimely Filing (Non-earnings Reconsideration)	The non-earnings reconsideration claim was filed more than 60 days from the decision date.	Review the notice of determination from the initial claim to ensure you file the reconsideration no more than 60 days from the decision date.



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Upcoming Event

Work Incentive Seminar Event (WISE) Webinar

Next WISE Webinar, “Ticket to Work and Reasonable Accommodations” is on July 30, 2025, from 3-4:30 p.m. ET.

Resources

Phone

- Monday through Friday 9 a.m. – 5 p.m. ET
- Toll Free: 1-866-949-3687/TTY: 1-866-833-2967
 - Option 1: Beneficiary Help Desk
 - Option 2: EN Payments Help Desk
 - Option 3: EN Systems Help Desk
 - Option 4: State Vocational Rehabilitation Agencies

Email

For issues regarding Cost Reimbursement, Ticket assignment, the service provider website, and the Ticket Portal, email VR.Helpdesk@ssa.gov.

Next All VR Call Date

- The next All VR Call date is Tuesday, October 14, 2025, from 1-2 p.m. ET via Teams.
- Please send All VR Call topic suggestions to VR.Helpdesk@ssa.gov.
- Send suggestions for the next call by Wednesday, September 10, 2025.