



# QUARTERLY ALL VR CALL TRANSCRIPT

## JULY 8, 2025

**Keitra Hill (Moderator):** Good day and thank you all for joining the quarterly All VR Call. My name is Keitra Hill, and I will be the moderator for today's call. Before we begin, I'm going to get into the agenda and then we're going to go into some logistics. First, for our agenda, I'll be going through the logistics, then some announcements, and then some updates and reminders about Pre-ETS.

Next we'll provide information about the Payroll Information Exchange (PIE), and then we'll have a Q&A session specifically on that topic. Next we'll go over the top three payment denials for the second quarter of 2025. Then we'll have our final Q&A session and talk about some upcoming events.

Next slide please. Here we have our logistics. This call is being recorded and transcribed. It will be a 60-minute call. Participants are not permitted to record the meeting nor capture the transcript. During the Q&A sessions you, if you want to chat, we don't have chat available for today. You will have to ask all questions aloud. If you're joining by phone and you wish to ask a question, raise your hand utilizing star five, and you will be unmuted by the facilitator and then you'll want to press star six to unmute yourself. If joining via MS Teams app, you click the raise hand icon, and the facilitator will provide access to audio to allow you to unmute your microphone and ask your question.

Next, for logistics, please ask only one question each time you are called upon by the facilitator. Additional questions or comments can be sent to the [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov). Those questions not answered during this live event will be forwarded to the appropriate panelists for comment. For closed captioning, that is available for participants who are joining using the MS Teams application or a separate closed caption link that was provided in the invitation for today's call. To join the closed caption in Teams, you want to go to the *more* option at the top of the MS Teams window and click *language and speech*. Next, select *turn on live captions*. If you're using the link provided in the invitation, you want to paste that link into your browser, and that will open in a separate window for you to view the live captions.

Next, I'm going to go over a few announcements and those announcements are regarding the GovDelivery messages. Just a few reminders. We've had three this past quarter. On May 27, a GovDelivery was sent out regarding the VR Post-Employment Reimbursement. On June 11, we sent out the Pre-Employment Transition Services Kick-off materials that are now available online. Instructions for submitting the Pre-ETS claims were attached to that GovDelivery message. On June 13, we provided Virtual Cost Reimbursement Training, and those materials are online as well. Both the Pre-ETS and the Virtual VR Cost Reimbursement training presentations are available on the Your Ticket to Work website's Events Archive page under National Calls – Specific Topics.

Next, we'll have the Pre-Employment Transition Services updates and reminders provided by Shada Roper. Shada, please go ahead.



**Shada Roper (SSA):** Good afternoon, everyone. We're at our full rollout for Pre-Employment Transition Services (Pre-ETS) without further ado. I know some of you are excited and I appreciate the enthusiasm. We have run into a couple snafus, however, we are at the full rollout point. Effective June 2, SSA expanded the Cost Reimbursement policy to reimburse for Pre-ETS youth 16 and 17, focusing on those ages because that's the age group we're targeting. We are trying to reimburse you with Cost Reimbursement services based on that age group. They must receive Social Security Disability Insurance or Supplemental Security Income. This is part of our disability program, so they must be receiving benefits from Social Security. You have to have certain information. They should have received at some point in time SGA based on this service agreement leading to a VR claim. It still has to be a vocational rehabilitation claim, but it has to lead to SGA and everything that we do under VR services, even though we're respecting the Pre-ETS services. Those Pre-ETS services should have led to a VR claim and in addition to that, they should be based on Substantial Gainful Activity. It's just like anything else. You also have to follow the provisions under VR and Social Security regulations in addition to everything else that factors. Next slide please.

We have on the screen — and we cannot at this time accept any other Pre-ETS codes other than these service codes listed. If it's youth codes by Rehabilitation Services Administration (RSA) or something else by RSA that you're doing, we can only accept these five codes for cost reimbursement. That is what we were approved for to respect the idea of youth in transition and following the laws of the Workforce Innovation and Opportunity Act (WIOA). It has to be if you're on a supplemental claim, you can do 37 or you could do 103, 97, 109, 115 and 121. We cannot use any other codes that you might give us that have to do with youth. This is it. This is what we're working with in Cost Reimbursement. Maybe down the line somewhere we might be able to do something else, but in the meantime, this is what we were approved for. Once you submit your claims, they have to follow these five service codes, whether you're using the SSA codes because you're typing it manually or you're using RSA codes because you did it through Ticket Tracker or however you're doing it. It can only be these five codes. Next slide please.

In addition, with the codes, this is an audit, so we are auditing your claims. Therefore, when you are creating your claim in the Portal, you must submit the documentation using Document Type "Other". We need the signed service agreement plan, Individualized Employment Plan (IEP) or Section 504 plan. It's been addressed that some of you don't have all the documentation or it's different documentation. Please send us all this documentation because we're auditing your Pre-ETS costs. We need a signed IEP because somehow they were able to transition to a VR program because of those Pre-ETS services. So, we need a signed IEP or an amended IEP.

We will have to have the SSA-199 form listing the itemized cost for Pre-ETS. Once again, this is an audit. Finally, we need the authorization and proof for payment for those Pre-ETS costs. We're not asking for every cost that you are applying for or requesting for VR when it's an initial claim. We're literally asking for the Pre-ETS portion because now we're saying Pre-ETS were involved in this. The Pre-ETS got them to the VR program. We don't want you to get overwhelmed and think, oh my gosh, I have to submit everything as an audit. Just for those Pre-ETS services. If it becomes a PVR later, then that's a whole other animal. But while we're processing the Pre-ETS portion, we do expect that you will send this in with your Pre-ETS claim. If for whatever reason you did not submit all the documentation and



information, we are treating this as though it is a PVR claim and giving you 75 days to submit the information. However, we would like this on the front end, not to hold up your claims and not to flood our systems so that we have a whole bunch of pending claims that are supposed to be Pre-ETS. We're fine combining these claims. We're going through them with the warrants. We're looking at the service information. We're looking at the SSA-199 to make sure that you provided those Pre-ETS services, the five that we're requesting and the cost that you requested. VR agencies should do their due diligence to have this documentation, whether it's an initial claim or a supplemental claim, at the time that they're requesting reimbursement with Pre-ETS service involvement. Next slide.

For the claim submission instructions, one, make sure in the SVR Remarks, when it pops up to us, that it says Pre-ETS in the remarks. You should also put along with that, the service agreement date. If you don't, that's fine because we would have the documentation. So that's fine. But it should remark Pre-ETS, so we know there's Pre-ETS involvement. Whether it's initial, reconsideration, or a supplemental claim, we know that we're looking for these five codes. Have all the documentation ready to submit with your claim and do not generate several fax cover sheets for this. We're using "Other" for the Document Type, so put it in with that Other fax cover sheet so that we can get all these Pre-ETS services.

We are working on systems releases so that Pre-ETS can have its own fax cover sheet, can have its own radio button. We are working on several systems releases to respect and anticipate that now we have Pre-ETS. For all claims and to the service date on the Remarks tab only, that's it. You don't have to do everything else on the Remarks tab. Please enter the service agreement date along with Pre-ETS so that we know, okay, this is a Pre-ETS claim, and it needs to get to a certain work group. And the work group will verify all the documentation and decide. If anything, you will get an email from us saying hey, we don't have all the information, please provide all the information. Next slide please.

For initial claims, enter Pre-ETS costs first. Your costs are supposed to be in order anyway since this is the beginning. Even prior to the VR program, you would enter your Pre-ETS cost first that you're requesting for supplemental claims, and by the way, with initial claims, and I've gotten this, so let me clarify this. In addition to the Pre-ETS cost first being submitted, when you're submitting that claim, we do expect that you will follow everything that you would have done in an initial claim where the popup shows us the VRCER or the earnings in addition to saying Pre-ETS involvement and that service date. It is still an initial claim. We just now have Pre-ETS involvement. For supplemental claims, all you have to do is enter the Pre-ETS cost because you're verifying to us that hey, I need to be reimbursed for costs that were missed prior because I submitted an initial claim that had Pre-ETS costs in it and I was not reimbursed for my Pre-ETS services that led to the opening of VR claim, okay. And most importantly, we're only going back to May 2023 for those supplemental claims. Therefore, we started this pilot or phased rollout, I should call it, in May of 2024. You can only go back from supplemental claims one year, and we're taking it back to May 2023.

If you have any further questions, you can always email the helpdesk. If you need any clarification or any training, you can always email [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov). They'll get it to me, and you can email me personally. But we do have a team of people working on all these Pre-ETS, Candice and Katie. They're working on all the system issues. Therefore, we're putting this first. Renee has made it clear this is first. Any questions, please send them to the helpdesk or if you need any one-on-one, personally send them to me. I hope this helped a little bit for those of you who are a little bit reluctant or scared to submit



your Pre-ETS claims. We want to be able to reimburse you for these Pre-ETS costs. It's important to us, so we're not trying to, you know, evade it or anything. We're working on it pretty much all the time. That's it. If that's it for the next slide, Keitra.

**Keitra Hill:** Yep, that is it. Thank you so much, Shada. I appreciate that information. Next, we will go into the Payroll Information Exchange Implementation, which will be shared by Kristine Erwin-Tribbitt. Kristine, please go ahead.

**Kristine Erwin-Tribbitt (SSA):** Hi everyone. I just want to apologize before starting here. I am suffering with a really bad cough and so I may go on mute to avoid coughing in your ear. I'm here to talk about the Payroll Information Exchange or PIE, the implementation of it. I want to provide some background on PIE, discuss the PIE authorization form. And then I also want to let you know when the beneficiary should report wages and also provide some reminders on what should continue to be reported even though we have a PIE authorization on the file. And then I want to just go over a few things you can do to help us out. Next slide.

PIE came about from section 824 of the Bipartisan Budget Act of 2015 and what it really did was give us the authorization for us to enter into an information exchange with a third-party payroll data provider. As long as we are obtaining wage and employment information for the purposes of improving program administration and preventing improper payments, we can enter into a third-party payroll agreement to receive wage information for Social Security disability insurance benefits and Supplemental Security Income. We contracted with Equifax to receive the wage and employment information for both SSDI and SSI beneficiaries and also for SSI Deemers. And if you're not familiar with that term, that refers to a person whose income and resources are considered when determining another individual's eligibility for benefits. Typically, a Deemer is a spouse or a parent or some other household member whose financial situation can affect the monthly benefit for the primary beneficiary. We will receive wage and employment information on a monthly basis and only for the month prior. So actually, right now we're receiving the June wages through the PIE exchange. We did our first exchange in April with approximately one million SSNs, so we've been doing sort of a slow rollout.

We are expanding the number of SSNs we send over to Equifax each month, and we're hoping to be at full implementation next month. A couple of questions I often get when I give this presentation is, "Will PIE contain self-employment data or 1099 data?" It will not. So, any self-employment data will still need to be reported. Generally, what I tell folks is anything you can get or acquire through the Work Number if you use that service, we will get that same information through the PIE data. Okay, let's talk about the PIE authorization. Next slide.

We use the form SSA-8240 to obtain authorization to receive the wage data and employment information. We can collect the authorization form from applicants or beneficiaries. If the person files for disability, the authorization is billed into our disability application process. If they've recently filed within the last five years or so and have said yes to allowing us to get their wage information, we have an authorization on file for them. However, for those that have been maybe on longer or declined it for whatever reason, we do take every opportunity when we're speaking with our beneficiaries to request the PIE authorization when we show there's no active one on file. The beneficiary can sign and attest the form over the phone, so if we do have a phone interview, we can take the form over the phone. What are some of the advantages of the PIE authorization? Well, it provides the beneficiary protection from



certain penalties for errors or not reporting wage information timely. We also will find good cause if the participant fails to report or reports a late change in an employer. Let's say the beneficiary has an active authorization. Next slide.

A beneficiary with an active authorization must continue to report wage and employment information until we or SSA sends a notice informing them they can stop reporting for that employer. A beneficiary with an active authorization can also revoke the authorization at any time, but they will need to understand that with the revoking process, they will have to then report wages. And they could be subject to any penalties for late reporting or omissions in information. Once the beneficiary has received a PIE notice, they will need to continue to report other requirements. For example, changes in the living arrangements, changes in resources or other income, change in employers, or if they return to work. And the reason why I bring this one up about returning to work is that for our SSDI beneficiaries, if they are not working, let's say on sick leave but they're still receiving their full salary, the PIE wage data will only tell us that they're receiving their full salary, but won't necessarily tell us that the person's returned to work. So, they still need to report that information to us. And, if the beneficiary also notices any inaccurate information on the notice, and I give the example of, let's say we say, oh, we're getting wage information from your employer, ABC Company. And the beneficiary says I've never worked for that company. They need to report to us immediately. We will likely in that situation probably refer them to Equifax to resolve the issue because Equifax will need to do an investigation. And during that time, we do pause the SSN and the earnings from going back and forth until we can resolve the issue because we don't want to be changing benefit amounts that are incorrect. Okay, so let's take a look at a PIE notice. Next slide.

This would be a PIE notice the beneficiary would receive telling them they can stop reporting wages and employment information for the employers listed in the notice. I wanted to provide this example to point out that if the beneficiary starts with a new employer, we do need to know that information. Until the beneficiary receives a notice to stop reporting, they need to report their wages. This is especially true for SSI beneficiaries. The reasoning behind this is that we need to confirm with Equifax whether they have the wage data for the new employer. The notice will also explain what responsibilities are still required, which I went over earlier about income and resources and returning to work. Now when we stop receiving wage information from Equifax, let's go to the next slide.

The beneficiary would receive a notice saying resume reporting notice. And this notice outlines that the employer is no longer receiving wage or employment information. If the beneficiary is still working for these employers, they need to report their wages to us. There are a few reasons why the wage data has stopped. For example, an employer may no longer be working with Equifax anymore, or the beneficiary stopped working for the employer, or the beneficiary has revoked their authorization. This is when they would receive that resume reporting notice. Okay, let's go on to the next slide.

This is PIE automation and so what happens when we receive the wage information? If they're receiving Social Security disability and benefits, the earnings data is evaluated by our Work Smart program to determine if a work CDR is needed. If we believe the beneficiary is working over SGA, we will alert the field office that a work CDR is needed. If the beneficiary is receiving SSI, the wage data is sent directly to the SSI record and the SSI payment is adjusted automatically. This is especially true when the EIN has been established in the SSI record. So that's why it's important for the beneficiary to report their new



employer so that we can set up the new employer on the record. If the benefit adjustments are not successful, then an alert is generated to the field office technician to correct the record. Okay, let's go into the next slide on how you can help us.

Encourage beneficiaries to provide authorizations. If you get any questions about whether they should sign the authorization, please encourage them to take advantage of it. You may be asked by clients to explain the notices, and we just need your assistance to reinforce that they still need to report changes in living arrangements or changes in income and resources, or when their medical condition might improve or that change in employer or that they returned to work. If the beneficiary is questioning any information on the notice about the employers, like the name of the employer or that they didn't work for them, please tell them to report to SSA immediately. They will likely have to reach out to Equifax to correct the issue, but the notice will provide contact information for Equifax. Lastly, please remind beneficiaries to report work incentives. The wage and employment information we receive doesn't provide any evidence of Impairment Related Work Expenses, subsidies, sick or vacation pay. And for SSI, we still need information for Student Earning Income Exclusions in the blind works expense or any impairment related work expenses. So please continue to report those. Now I can take some questions if anyone has any.

**Keitra Hill:** Alright, so here is how you ask any questions. Again, if you are over the phone, you will raise your hand by dialing star five, and you'll be unmuted by the facilitator. Then you'll press star six to unmute yourself. If in the MS Teams, you'll want to raise your hand by selecting the raise hand icon. Your mic will be unmuted by the facilitator and then you must click the microphone yourself to unmute. Please do state your name, the name of your VR agency and ask your question. Emani, do we have any raised hands at this time?

**Emani Cain:** Keitra, yes, we do have one raised hand from Kristin. You can go ahead and unmute yourself and then ask your question.

**Kristin Venator:** Hi, my name is Kristin Venator. I'm from New Hampshire VR. Thank you. I just have a question about the notification. I know that you said that like all new Social Security applicants are getting an authorization, you know, to sign off on this. Can you clarify if all current Social Security beneficiaries have gotten a Social Security notice asking them, you know, if they want to opt into this?

**Kristine Erwin-Tribbitt:** So, what's happening right now is like any opportunity we cross paths with the beneficiary if they call to ask us a question about returning to work or anything to do with their SSI benefit, the technicians are being trained to look for an active authorization. And if there's not one on file, they will send the form or complete the form over the phone if we have them. I do believe we did several federal register notices early on. We've been collecting authorizations for the last, I think it's seven years when we implemented it. We've been trying to publicize it as much as we can, but you know for most folks who may never return to work, you know, an active authorization isn't as critical. But certainly, if somebody's reaching out to us with, you know, with work related questions or we're doing a redetermination on an SSI beneficiary or doing a work CDR for an SSDI beneficiary, we're going to be looking for that active authorization. And if we don't have one, we'll send the form to the beneficiary.





**Kristin Venator:** Thank you for that. If I could just clarify a follow-up in that. So, if somebody's using the Portal and reporting their wages every month but there's nothing else that, like a communication with Social Security, have those individuals gotten this notification or not?

**Kristine Erwin-Tribbitt:** When they evaluate the wages, they'll get a notification as to whether we have an authorization on file.

**Kristin Venator:** Okay, okay, thank you.

**Emani Cain:** Next question is from — Cassie, if you can go ahead and unmute yourself and ask your question.

**Cassie:** Hey everyone. When a customer calls and reports a start of work and they have a myssa.gov account it can take several months before they can report online because the information has to be synced, I guess. How quickly does this come into play, the PIE report? Like if they start working today, is it going to show up next month, or is it going to be, you know, September, October. What kind of guidance can we give our customers?

**Kristine Erwin-Tribbitt:** I would say it can be as early as the next month, but to be sure, probably give it two months. Because we do have to set the record up to receive the wage data. However, the technicians are being trained, and there has been a big push, you know, leading up to our April implementation date to do as much of that EIN work on the SSI records, and I think they did a great job of setting up a lot. I would say 30 days. But you know, we do get the wage information right about this time around July 7th, 8th, so if they were to mail it in today, it may take 60 days just because of the, you know, we just received the wage information.

**Cassie:** Okay, thank you.

**Emani:** Hi Eugenia, yeah go ahead.

**Eugenia:** Hi, my question is, if the form isn't signed by the beneficiary, would you ever ask VR to have them sign it and submit it? And would that give the state VRs the ability to also use the Work Number for the individual?

**Kristine Erwin-Tribbitt:** No, the PIE authorization, I'll answer your second question first. The PIE authorization is only the authorization between us, SSA and the beneficiary and technically with Equifax. You would not be able to use it for obtaining access to the Work Number. And for your first question, the authorization form, you can help us if you know for sure the beneficiary doesn't have an active authorization, you can certainly help us to obtain the form. I would just not do it in bulk. Because if we start receiving tons of requests and we find that a lot of them already have active authorization, that's just going to create a workload in our field offices that we don't have time to address. But certainly, if you've kind of talked —

**Eugenia:** Did you go away?

**Katherine Jett:** Hi, Kristine, I think we lost your audio.

**Eugenia:** I got the gist of the answer though. Thank you.



**Katherine Jett:** Thank you, Eugenia.

**Keitra Hill:** Okay. Yeah, Kristine, if you've had another question, you can go ahead and raise your hand again and we'll definitely come back to you. Next, we have Donna. Donna, you have been unmuted. Go ahead and unmute yourself and ask your question.

**Donna:** Hi, I was just wondering if any kind of announcements have gone out or will go out that could be shared on social media?

**Keitra Hill:** Do we have Kristine back yet, Katherine?

**Katherine Jett:** Hi, Keitra, no. Kristine has dropped.

**Keitra Hill:** Okay, alright. For now, since she has dropped, we're going to wait for her to come back, but we're going to move forward in the presentation and then we'll have a final Q&A session where you can ask any additional questions regarding that.

Alright, so next, I will share some information about the top three payment denials for the second quarter of 2025. First, here are our top three denials, the 220 eight months or less of SGA. We had a total of 282 in in the second quarter rather, 320, nine months of SGA, but not within a 12 month period, 253 total. And then for 620, untimely filing we had 516. That's the top of the three. In the next few slides, we'll go through each of these. Next slide please.

Here is our code 220. Again, this denial reason is eight months or less of SGA. The description is that eight months or less of verified SGA level earnings were found in SSA's records, so eight months or less. A tip to avoid this type of denial is if the initial claim was denied due to insufficient earnings, please wait additional six months to submit a reconsideration claim to avoid another 220 denial. Next slide please.

Here we have the 320 denial. And for that reason that's nine months of SGA but not within a 12-month period and a further description is that nine months of SGA were found, in SSA's records, but the nine months was not within a continuous 12-month period. Next slide please.

Here we have our tips to avoid this type of denial. You want to check the quality wage information to determine if there are three out of four quarters of SGA level earnings identified. If not, the SVRA must provide verifiable documentation of three out of four quarters of SGA level earnings.

Next, if an additional claim was denied due to insufficient earnings, please wait an additional two quarters to submit a reconsideration claim to avoid another denial. Next slide please. Here we have our 620 denial, and this is untimely filing on an initial claim. The initial claim was filed more than one year from the last month of the SGA. A tip to avoid this is to review the earnings provided on the vocational rehabilitation clients earnings report, the VRCER, to assure you filed that claim no more than one year from the last month of the SGA. Next, we have untimely filing for earnings reconsideration. This description is for the reconsideration claims when an earnings denial was filed more than one year from the decision dates. A tip to avoid this type of denial is review the notice of determination from the initial claim to ensure you file the reconsideration more than, no more rather, than one year from the decision date. Next slide.





Here we have the untimely filing for no earnings reconsideration. The non-earnings reconsideration claim was filed more than 60 days after the decision date. To avoid this type of denial, if you want to review the notice of determination from the initial claim to ensure you file the reconsideration no more than 60 days from the decision date. Next slide please.

Now we will go into our final Q&A session, and we do have Kristine back. We will go to her to ask any additional questions in reference to PIE. If you're over the phone, you want to raise your hand by dialing star five, and you'll be unmuted by the facilitator. Then you'll press star six to unmute yourself. If in MS Teams you want to raise your hand by selecting the raised hand icon. You'll be unmuted by the facilitator and then you'll unmute yourself by clicking your mic. I believe our first question is from, oh, sorry, going back to see where that is at.

**Emani:** Thank you. I'll just jump in. We have one from Donna.

**Keitra Hill:** Thank you. I didn't see it. Okay, thank you so much. Donna, please go ahead and ask your question or continue with your question.

**Donna:** Okay, yeah, my question was. I wondered for the PIE implementation, are there any announcements that are going out that could be shared on social media or has something already gone out?

**Kristine Erwin-Tribbitt:** Something has already gone out. I'll try to see if I can find it, but I think it went out in early April right before we did full implementation.

**Donna:** Okay, thanks.

**Keitra Hill:** Next question we have is from Maria. You can unmute yourself and ask your question.

**Maria:** Hi, I'm Maria from Ohio VR. In the payment denial code 320, you said that the SVR, we could provide verifiable documentation. What would you consider verifiable documentation if your UI wages disagree with the VRCER file?

**Keitra Hill:** Hello, Maria, this is Keitra. I will defer that question to SSA in reference to the 320 denial. What would be considered verifiable information you said when what information doesn't match Maria?

**Maria:** So, on the one slide, it said that the VR agency must provide verifiable documentation of three out of the four quarters at SGA level earnings. One of the things that we're finding is that our UI wages disagree with what comes through on the VRCER file. So, if we can provide documentation that the person did meet SGA, even though the VRCER file seems to be incomplete, what would be considered verifiable documentation?

**Candice Whaley:** Hi, this is Candice Whaley from SSA. I'll go ahead and answer this, Keitra, if you'd like.

**Keitra Hill:** Yep, thank you.

**Candice Whaley (SSA):** Our verifiable information is currently yes, your UI wage data. Any earnings from the work report, any pay stubs, anything like that. If VRCER is different than what we have, go ahead and submit that with your claim. Remember, we can take any kind of quarterly earnings as long as they meet



the criteria that we sent out in the blast. If all of the earnings that are on SSA's records and the VRCER file shows that one of the quarters is not SSA. Say for instance, when you're submitting the claim. We're looking at the VRCER file. You must have at least nine months of SJ on VRCER for us to even look at the claim. It's very important for you to submit the documentation, I mentioned this on another call, so that we can still review your claim because we have that documentation in front of us. We're looking for the earnings on the remarks tab. We're looking for VRCER. We're looking at our earnings to see if there's at least nine out of 12 months or any kind of documentation that the VR submits. The documentation should have the employer, the SSN, their quarterly earnings and the month and the quarter of those earnings and the employer as well for us to receive that as considered verifiable documentation. SSA will audit these claims at a later date to make sure that that documentation, those quarterly earnings did show up on SSA's records. We have an audit like after six months after we actually pay your claim if those earnings are not showing on VRCER. Please just submit any kind of quarterly wage data, pay stubs, Work Number, any documentation that has everything that I just identified. And if you have any further questions, please contact the VR helpdesk.

**Maria:** I'm sorry you said employer, SSN number, and their quarterly earnings?

**Candice Whaley:** Yes, the employer, the SSN, the quarterly earnings and the quarters, the month and quarters of the earnings, all of that has to be on your documentation. We cannot accept just a spreadsheet from the actual VR. We have to have that UI, wage data and those quarterly earnings as a faxed document.

**Katie:** Candice, this is Katie. I just want to make sure we got it really clear. If you are aware of currently wages right, you have the wage data right in front of you that has the identifiers, Candice just said, and I'm going to have her to repeat them, so we all have it, you know, and it disagrees with VRCER, go ahead and send what you have. You don't need to wait for it to appear on VRCER if you have it in your hand. If your wages disagree with VRCER, right, and you have in your hands valid quarterly wages as long as it matches the criteria, like Candice just said, send that over and fax it. Do not wait for it to appear in VRCER. Candice, can you repeat it just one more time what needs to be on the UI wages proof for us.

**Candice Whaley:** Yes, we need the Social Security number, the name of the employer, the quarterly earnings and the month and quarters of the earnings. Some UI wage data will just show the Social Security number, not the name. That is acceptable.

**Maria:** What do you mean by month and quarters of earnings?

**Candice Whaley:** If you have the second quarter of 2024 for the earnings for \$7,000 for that quarter, third quarter 2024, \$8,000 for that quarter and the fourth quarter of 2024 \$10,000 for that quarter, we have to have the quarters, the month and the quarter and the applicable earnings as well.

**Keitra Hill:** I'm still not understanding what you mean by month though, because I don't hear a month in there. I only hear second quarter of 2024, third quarter of 2024.

**Candice Whaley:** Actually, I'm trying to say the quarter and the year, I apologize. For quarterly earnings, it's the quarter and the year.

**Keitra Hill:** Thank you, that's fine.



**Candice Whaley:** You're welcome.

**Keitra Hill:** Okay. Thank you.

**Kathy:** Thank you, Maria.

**Keitra Hill:** Okay. I would ask at this time that we first have questions about PIE and then we can move to additional questions about either the denials or the Pre-ETS. So, Alicia, I see that you're next. If you can go ahead and unmute yourself and ask your question. If it is about the denials, if you could hold that question. But if it's about PIE, please go ahead.

**Alicia:** You know what it's actually, can you hear me?

**Kathy:** Barely. Speak up just a little bit.

**Alicia:** Can you hear me? Hello.

**Kathy:** Hi, Alicia. I can hear you.

**Alicia:** Oh, perfect. My question was regarding the codes, but if you wanted to wait, I can definitely wait.

**Keitra Hill:** Okay, your question is a reference to the denials.

**Alicia:** It's actually in reference to like the codes that you guys mentioned right at the beginning. I think it was like a code 37, code 97 and something of that nature.

**Keitra Hill:** Alicia, it's kind of difficult to hear you. Is there some way you can come through clearer.

**Alicia:** You know what, let me go ahead and try, and try another way, so I'll ask in a minute.

**Keitra Hill:** Okay, thank you. Okay, our next question is from Cassie. Cassie, please go ahead. You can unmute yourself now. Go ahead.

**Cassie:** I'm just not very speedy. I'm sorry.

**Keitra Hill:** No worries.

**Cassie:** I want to know, will we have access to this information for cost reimbursement? Is it going to be added like VRCER? I guess that's my big question.

**Keitra Hill:** Kristine, that question was for you, sorry, go ahead.

**Kristine Erwin-Tribbitt:** Oh well, I don't even know what VRCER is, so I can't answer the question. But if you're talking about PIE wages, I don't think you will have access to it, but can someone from the VR team help here?

**Candice Whaley:** Hi Kristine. the VRCER file is just our batch match with the Office of Child Support and Enforcement. So, it's the quarterly wages from the Office of Child support, yeah.

**Kristine Erwin-Tribbitt:** Okay. Okay. Alright. No, because we've contracted with Equifax. So, you know, they want to get their money. They won't let us share the wage data with anyone else other than who's



paying for it. You may see some of the wage information in some reports that may get sent out where it'll reflect the monthly wage. That might be PIE; it might be IRS earnings, you know. It won't ever be real clear that it was coming from PIE unfortunately.

**Cassie:** Well, are there any plans to use PIE to maybe help build up VRCER? That's not more of your question. That's more of an SSA question. I mean VR question.

**Candice Whaley:** Currently I haven't heard anything about that. Is that Renee?

**Renee:** Hi yes it is. Yes, we have not made that determination yet. If we decide to use PIE, we will let you know.

**Cassie:** Okay, thank you.

**Renee:** Thank you.

**Emani:** Does anyone else have a question about PIE for Christine?

**Keitra Hill:** We have Anita. Anita, you can unmute.

**Anita:** Actually, that was my question. I was wondering whether or not the PIE information was going to be shared with us, so that's already been answered. Thank you.

**Keitra Hill:** Thank you, Anita. Our next question, Katherine, is from Maria or am I out of order.

**Katherine:** Maria.

**Keitra Hill:** Maria, please go ahead and unmute yourself and ask your question. Hi Maria. You can go ahead and unmute yourself and your question.

**Maria:** I think I already went, so I didn't, I didn't know if I, maybe I didn't lower my hand or something, but I already went. Thank you.

**Keitra Hill:** Okay, thank you.

**Katherine:** Angela is next.

**Keitra Hill:** Angela, please go ahead and unmute yourself and. Ask your question.

**Angela:** For PIE data, will it only be big businesses that are working with it, or will your small mom and pops somehow be connected with Equifax too?

**Kristine Erwin-Tribbitt:** They have quite a few employers. There are some mom and pop places, and there are some of your bigger ticket folks. We're seeing kind of everything across the board except for self-employment.

**Keitra Hill:** Okay, thank you, Angela. Thank you, Kristine, for answering that question. Our next question is from Alicia. You're back again if you want to go ahead and unmute yourself and ask your question. Alicia, you're unmuted on this end. If you want to unmute yourself and ask your question.



**Alicia:** Can you hear me this time?

**Keitra Hill:** Hi, we can hear you now go ahead.

**Alicia:** Perfect. My question was in regard to the original post that you guys mentioned at the beginning. Starting with like a code 37, 97. And I'm not sure about the other code.

**Keitra Hill:** Okay, this is in reference to the Pre-ETS. Actually, at this time we're taking questions in reference to the PIE topic. Can you hold just a bit and we'll come right back to you?

**Alicia:** Okay.

**Keitra Hill:** Alright, our next question is from, sorry.

**Katherine:** That's all the questions we have for PIE.

**Keitra Hill:** Oh, okay. Alright. Well, let's go back to Alicia with her question for Pre-ETS.

**Katherine:** Alright, Alicia, you have access to your mic. You can unmute.

**Alicia:** Okay. So, for like the post 37, 97 and I think it was 109, 115 and 121, I think it's the other one. Are those the only codes you are always going to be accepting for like every claim moving forward?

**Shada Roper:** Good afternoon. Those are the codes we've been approved for. They are the codes that were recognized by RSA by WINTAC having to do with those services. At this time, we're not taking any other youth or youth transition services other than the five that fall under those codes.

**Alicia:** [Indistinct]

**Shada Roper:** 37 or 103. If you're using your RSA information, you can use 103. Thirty-seven is the SSA code, especially if you're putting it manually. Therefore, you can put that in manually. But as far as we know, those were the codes that we were approved to reimburse for having to do with Pre-ETS.

**Alicia:** Thank you.

**Shada Roper:** You're welcome.

**Keitra Hill:** Okay, next --

**Emani:** Next question is from Shelby.

**Keitra Hill:** Yep. Thank you, Emani.

**Shelby:** Hey everyone. Sorry if this has already been answered. I came in a little bit late right when you were doing the Pre-ETS codes. And for Pre-ETS are you also going to be covering ACP costs? Will that be included on an initial claim? I know for supplemental it wasn't, but for initial claims is ACP also covered for Pre-ETS?

**Shada Roper:** So that's part of your cost reimbursement. Yes, it is part of the cost reimbursement because they're not submitting an initial claim with just Pre-ETS cost, you're submitting your actual



regular initial claim. It just has Pre-ETS involvement. Therefore, we're following the process under cost reimbursement. And the system will calculate your ACP.

**Shelby:** Thank you.

**Shada Roper:** You're welcome.

**Keitra Hill:** Great. Thank you. I believe we have one more question that just came in from Kim. Kim Farley, if you can go ahead and unmute yourself and ask your question.

**Kim Farley:** Okay am I unmuted?

**Keitra Hill:** Yes.

**Kim Farley:** Okay. I kept clicking it and I, my question, I just want to make sure I understand this is on the denial codes. You had mentioned that if it's not on the VRCER list that you don't even look at the claim. So, we upload our claim file, and we were told before to put like the quarterly amounts there, on there, if we're not using the VRCER report. So, we put the quarterly amounts. Do you not even look at that if it's not on the VRCER report?

**Candice Whaley:** Hi, this is Candice again. Yes, we do look at any of the quarters and years that you put and the applicable earnings on the SVR remarks tab. That's why we do tell you to go ahead and do that. As long as you have nine months, then we can go ahead and review your claim.

**Kim Farley:** Okay, I wasn't, I misunderstood because I thought, oh, shoot, we're putting this and it's not even getting looked at. So, I didn't know if I needed to fax something, you know, with the bar code along with that. And another, can I ask another question while I'm on here? Our IDIS is uploaded to our software program, so when we print out our report from there, all that information comes from IDIS. Is that good enough to send in if we have to send back up on that?

**Candice Whaley:** I would say I'd have to look at it before, you know, when I make a decision, not me, but when SSA makes a decision. Because we can't, like we've had some people submit spreadsheets with that information and that's like not acceptable because it's from in house. Is that from in-house?

**Kim Farley:** I'd have to pull one up, just, I haven't had one for a while that I've done that way. Yeah, I'd have to pull one up to see if it's an actual report from Illinois Employment Security on that. So, I don't know if it's something that was just included, you know, when they upload the information from IDIS into the system, if it's redone, you know, redone to fit our program. So, I'll have to look at that to see.

**Candice Whaley:** Let's table this, and can you send it to the VR Helpdesk, and we can review it from there and then SSA can make a decision on that?

**Kim Farley:** Okay, yeah, yeah, I can do that. So, okay, I'll send one over to you.

**Candice Whaley:** Thank you very much.

**Kim Farley:** Thank you.

**Candice Whaley:** I think that's it.





**Chauna Dixon:** Hi. This is Chauna Dixon from Social Security, and I just wanted to add too as well as far as when we do not look at a claim for anyone else who may have a little bit of confusion on that. The only times we do not look at your claim, and we call that a 590 denial, is when you submit the word VRCER in the remarks tab. We check our quarterly earnings, and we do not see three out of four quarters of earnings. Then you will receive a 590 denial. Also, for the other VR who said they submit quarterly wages, we'll look at those wages. If we do not see three out of four quarters, then you will receive that 590 denial. Or if you stated that you were going to fax documentation in and we have not received that documentation within 24 hours of you submitting the claim, then we will deny that claim of 590. If we don't receive any evidence, quarterly earnings, primary evidence or anything of that nature. So, I just wanted to make that clear as well. Okay, thank you.

**Emani:** This is a question from Eugenia. You can unmute yourself and ask your question.

**Eugenia:** Yeah. This one's for Candice. You had given the list of what was required for the UI wages if you're submitting that, I'm assuming, under Other. We're still waiting for a decision on the source of the data. We, the Texas Workforce Commission also houses the UI unit for unemployment insurance. And so is the source as far as where we're concerned, we need to know what the source needs to be for us to submit that.

**Candice Whaley:** Yes, I spoke to your finance department, and he said he was, you were working on something, and you would get back to me when it's finalized because I gave him all the information that he needs. And that was two weeks ago. I'm just waiting for him to get back to me with the document so that Renee can approve it or not.

**Eugenia:** Oh, okay, alright.

**Candice Whaley:** Okay.

**Eugenia:** Thank you.

**Candice Whaley:** You're welcome.

**Eugenia:** Bye.

**Emani:** Our next question is from Anita. You can unmute yourself and ask your question.

**Anita:** Hi, my question is a Pre-ETS question. If we submit claims for Pre-ETS case that was, that goes back as far as the May 1, 2023 date, is that automatically considered a supplemental claim, or can that also be considered an initial claim?

**Candice Whaley:** If we pay the claim, Anita, in May 2022, therefore it would be a supplemental claim. An initial claim is a claim that you're processing right now where you never got any Pre-ETS benefits. If you're saying that you want to submit an initial claim from May 2023 though, with Pre-ETS involvement, then they would have to follow the guidelines of everything else involved with Pre-ETS having to do with their age, so they should have been 16 or 17 at the time. It should have led to a VR claim in 2024 or 2025. And then we would look at the initial claim. The reasoning why we say May 1 is for supplemental claims because we're not looking at any paid claims that were paid before May 1, 2023. Does that help?



**Anita:** Got it. That helps a lot. Thank you.

**Candice Whaley:** You're welcome.

**Keitra Hill:** Thank you, Anita, for that question and thank you, Candice. At this time, we are going to move forward. Any additional questions you have in reference to Pre-ETS, PIE or the top denial reasons. Again, please send those to [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov). If we can go to the next slide and then I'll come back to that email address because it will be on screen.

Upcoming event for this month on July 30, we have our Work Incentive Seminar Event (WISE). The topic this month is Ticket to Work and Reasonable Accommodations. Again, that's on June 30. The registration is open now on the Choose Work website. Next slide please.

Here are the Resources if you have any questions, as I mentioned, if you have any questions about any of the topics shared today that you were not able to ask, please send those to [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov). You also can contact the help desk by phone Monday through Friday from 9:00 a.m. to 5:00 p.m., and we have the toll free number. Option one is the Beneficiary Help Desk. Option two is the EN Payments Help Desk. Option three is the EN Systems Help Desk and then option four is for State Vocational Rehabilitation Agencies. For email, you can email any questions regarding cost reimbursement, Ticket assignments, the service provider website or the Portal or any topics again shared today.

I want to thank everyone so much for their participation in today's call. I want to thank Kristine for the information that she shared in reference to PIE and Shada for the information you shared in reference to Pre-ETS. That concludes today's call. Have a great rest of your day.