

Company: Social Security Administration
Conference Title: Social Security Conference Call
Conference ID: 8049381
Moderator: Joie Hill
Date: December 12, 2017

Operator: Good day. Welcome everyone, to the electronic wage reporting and other tools for beneficiaries' conference call. Today's conference is being recorded. At this time, I would like to turn the conference over to Joie Hill. Please go ahead.

Joie Hill: Thank you very much. Hello, everyone. Welcome to our conference call on electronic wage reporting and other tools for disability beneficiaries. Over 800 people registered to participate in this call from all over the country and we greatly appreciate everyone taking time to join us today.

We will discuss the basics about overpayments, my social security accounts, mobile and online wage reporting tools, and internet appeals.

Again, this is Joie Hill and I am the National Lead for Disability Organizations in Social Security's Office of Internal Affairs. I am the liaison to National Level Disability Groups and Organizations. I am responsible for creating relationships and collaborating on projects. Some of the projects that I collaborate with Disability Groups on include hosting office calls such as this, planning roundtable meetings, publishing blogs on our Social Security Matters blog site, and scheduling speeches or workshops at national conferences.

If you would like to discuss ideas for collaborating, please call me – contact me directly. My email address is joie.hill@ssa.gov. My first name is spelled J-O-I-E. And my last name is spelled H-I-L-L. Again, my email address is joie.hill@ssa.gov.

We have very, very knowledgeable speakers on the call today that will be providing you with a wealth of information. The first speaker is Carol Bates-Harris. Ms. Harris is a Senior Advocacy Specialist at National Disability Rights Network. The second speaker is Ann Clifton. Miss Clifton is a Public Affairs Specialist in our Office of External Affairs. After Miss Clifton, (Kayla McNeil) will speak. She is a Program Analyst in our Office of Electronic Services and Technology. The last speaker will be Miss (Karen Bennett-Yates). Miss (Bennett-Yates) is also a Program Analyst in our Office of Electronic Services and Technology.

After our speakers, there will be a Question and Answer segment. So, please jot down your questions. Now I will turn the call over to Miss Bates-Harris.

Cheryl Bates-Harris: Thank you, Joie. And thank you everyone for joining the call this afternoon. I was asked, specifically, to start off by talking about overpayments when Social Security beneficiaries go back to work. So, I'll start, first of all, by defining what is an overpayment.

An overpayment occurs when a beneficiary receives more money in a month than the amount he or she should have been paid. So, the overpayment is the difference between the amount received and the amount that should be do. So, how do overpayments occur? They occur for different reasons in the different programs.

I'm sure, as you are all aware, there is a difference between supplementary security income and social security disability insurance. So, I'm going to start off by talking about in the SSI program, anytime there is an increase in earnings or unearned income that isn't reported or known to Social Security, that could result in an overpayment. Other ways that overpayments occur in the SSI Program could be changes in living situations. An individual goes from a family of one living in its own place to living in the home of another. Also, because SSI is a needs-based program, if an individual accumulates more resources than are allowed under law that that could result in an overpayment. And the final reason, or most common reason, is that there's an error in calculating

the individual's benefit amount due to the fact that SSA has either incomplete or incorrect information and, therefore, they can't make the correct calculations.

On the DI side, overpayments generally occur when an individual receives their full benefit check after the trial work period when their earnings are over the substantial gainful amount or \$1170 in 2017 if the individual is non-blind. An overpayment can also occur in the SSCI side if the individual has a conviction for criminal offense and they're confined for more than 30 continuous days while still receiving their benefits. So, the bottom line is the overpayment is an amount of money received from Social Security that is either an incorrect amount or shouldn't have been received at all.

So, why is this important that we talk about this? Because the effects of an overpayment can absolutely be devastating. Since my programs work on encouraging people to go back to work because work is the only pathway out of poverty, individuals when they return to work are adjusting to the increased cost of working. Suddenly they have clothing they need to buy. They have transportation costs. Perhaps additional meals. Child care. Those kinds of things. And, so, in the process of them adjusting to their new routines and their new work schedules, and they're trying to get ahead, and they're trying to improve the quality of their life, and then, all of a sudden, wham. They get a bill for thousands of dollars, and this totally throws their budget that they've been trying to develop out of whack.

As a result of an overpayment notice, it creates a lot of panic on the part of the individual. A lot of confusion – they don't necessarily understand why they're overpaid. There's a great deal of anxiety and a great deal of uncertainty. And this certainly adds stresses to the individual's ability to resume their daily employment and work activities.

So, it's really pretty easy to avoid overpayments, and I think that's the purpose of the call today. We want to stress that when you start working, it's really important that individuals report wages

to the Social Security Administration by the tenth day of the following month, along with any other changes that might have occurred. And it's also important here to note that because many individuals go back to work after working with an employment network or after working with the State vocational rehabilitation, that by reporting wages to the employment network or to vocational rehabilitation, that does not fulfill the responsibility to report the information to Social Security. And I think that creates some of the confusion. So, there are a number of reporting mechanisms that will be discussed today by the speakers who are following me.

I think it's important that beneficiaries, when they go back to work, need to learn about and use available work incentives, such as the trial work period and impairment-related work expenses. And there are programs that Social Security funds that can help you understand these work incentives and the work supports. And I'm going to talk a little bit more about them in a minute. They are the Protection and Advocacy for Beneficiaries of Social Security and also the Work Incentive Planning and Assistance Programs.

So, going back to the wage reporting, when an individual reports their wages, it's important that they send copies of their pay stubs and any receipts that they have for those impairment-related work expenses. And it's helpful to report any other changes to Social Security as they occur. And that includes changes in names, phone numbers, addresses, et cetera.

So, overpayments can, like I said, be devastating. But, there's a way to manage – individuals need to manage the overpayments. And, what I mean by that is you can't ignore an overpayment notice or a letter from Social Security that says that you have an overpayment, because ignoring it will not make it go away. But, when you get the information, if you feel that you have not been overpaid, or you disagree with the amount of the overpayment, you can seek assistance and help from the SSA-funded programs that I mentioned.

I want to step sideways for a just a minute because the Ticket to Work and Work Incentives Improvement Act of 1999 was developed to support career development for individuals with disabilities ages 18 to 64, and it was designed to help people with disabilities move towards financial independence and connect with services that they need in order to succeed in the workplace. So, one of those programs that was funded is the program that I work with nationwide, and that's the Protection and Advocacy for Beneficiaries of Social Security, which is Federally-funded and it's part of the National Protection and Advocacy System. And its purpose is to provide services to people with disabilities so that they're free from abuse, neglect, and discrimination based on disability.

Now, the Pass Program's our newest program and it is available in all states and territories. So, we have 57 Protection and Advocacy in the States, District of Columbia, all the U.S. Territories, and also the Native American Consortium, which is down in the Southwest. Our advocates and attorneys are specially trained to encourage individuals to try work and, therefore, reduce their dependency on public benefits. We all know that people with disabilities and, particularly individuals on SSI, are among the poorest in the country. And, therefore, income will help improve the quality of their life.

So, we're funded as a Community Partner to the Social Security Administration specifically to provide information and advice to beneficiaries with disabilities about obtaining vocational rehabilitation services, employment services, and other work supports that will enable them to join the labor force.

Our Pass Program specifically provides legal-based advocacy a beneficiary that will help them secure, maintain, or regain employment. In other words, we try to remove barriers to employment and help individuals achieve and maintain employment. We work cooperatively with a sister program that is also funded under the Ticket to Work and Work Incentives Improvement Act and that is the Work Incentive Planning and Assistance Programs. Just like the P&A Systems, there

is a WIPA Program available in every state and territory. And the goal of the WIPA Program is to enable beneficiaries with disabilities to receive accurate information and use that information to make a successful transition to work. The staff of the WIPA program are known as Certified Work Incentive Counselors or Community Work Incentive Counselors, and they provide in-depth counseling about your benefits and the effect that work has upon those benefits. So, they really understand the work incentives and they'll help you try to plan your transition to work.

So, we want to make sure that people don't let the fear of overpayment discourage your return to work efforts. There are a number of work incentives that are available. We don't have time to go into all of them today, but it's important to know that when you go back to work and you begin your transition from benefits to self-sufficiency, you do not automatically lose all of your benefits. It's a gradual progression, again, depending on whether you're receiving SSI or SSDI.

So, there's things like the trial work period and the extended period of eligibility. You may have continued access to Medicare. You may have continued access to Medicaid. And there is an expedited reinstatement provision that, if you have to stop working prematurely, or within a period of times, you can return to benefits quickly.

So, I would refer everyone who's interested in the work incentives to look at Social Security's Red Book. It's available online. It's updated annually, and it's a really good reference to all the work incentives.

So, I just want to kind of close by saying that understanding how work affects your benefits and how and when to report your earnings can make a huge difference in your successful entry or re-entry to work. And, just one added note. Social Security has a number of archived Webinars available on their work site on the SSA page that talks about returning to work. And I would also encourage individuals to go and look at those if you're interested in learning more.

So, thank you. Joie, back to you.

Joie Hill: Thank you, Cheryl. We appreciate your detailed information about overpayments and on organizations that help our disabilities beneficiaries go back to work.

Now I'm going to turn the call over to Miss Clifton and she's going to provide an overview of My Social Security accounts.

Ann Clifton: Thank you, Joie. My Social Security accounts is an easy-to-access, easy-to-use portal to be able to view and update Social Security information. So, for disability beneficiaries, it can be useful in a lot of different ways.

If you're receiving benefits or have Medicare, they can replace Social Security cards, if they live in certain States that allow that; get a Benefit Verification letter as proof that they are receiving benefits, which that's probably the most popular item that is used; check benefit and payment information and earnings records; change address and phone number; start or change direct deposit of the benefit payment; and request a replacement Medicare card. And, during tax season, they can also receive a replacement SSA1099 or an SSA1042(s) which shows what they've been paid in benefits for tax purposes.

In addition to that, we do have a new tool that allows the individual, if they're receiving Social Security disability, to provide wage information. But, Kayla will be covering that in just a moment.

Now, if the individual wants to set up the My Social Security account, you do have to be age 18 and they do have to have a valid email address and a U.S. mailing address. And, once they go to our Web site, which is socialsecurity.gov/myaccount, they can select sign in or create an account, and provide some personal information to verify their identity. Now, because most of us probably share a little bit more about ourselves – especially with social media – it's going to ask

you some out-of-pocket questions or ask them out-of-pocket to determine that we are doing business with the right person. And, once they get through that verification process, they can choose a username and password.

Now, we do have multi-factor authentication that requires them to provide either an email address or a cellphone number so that we can text them a number to either one and allow them to use that in addition to the username and password to provide extra security.

Now, again, this tool is a very good tool for individuals who are receiving disability because they can use it for several different ways. And, as I said before, Kayla's going to go into what the My Wage report tool is and then later (Karen) will talk about the details of internet appeals.

Joie Hill: Okay, thank you very much (Ann). We appreciate that. (Cecilia), this is Joie Hill. We heard a little bit of static in the background. If there's anything you can do to decrease or eliminate that, we would greatly appreciate it before our next speaker.

I'm going to turn the call over to Miss (Kayla McNeil) and, again, she will talk about the Mobile Wage reporting tool and the My Wage reporting tool. Thank you.

(Kayla McNeil): Thank you, Joie. As Joie said, I'll be discussing with you the electronic wage reporting tool. Electronic wage reporting allows beneficiaries, recipients, and representative payees to report electronically to SSA. They can report wages online, via a cellphone, tablet, desktop or laptop computer.

SSA has two methods for electronic wage reporting. They are the Supplementary Security Income Mobile Wage Reporting Application or SSIMWR, which is accessible via the cellphone or tablet. And, also, My Wage Report Application, or MYWR, which is a responsive design

application that is accessible via the internet-ready devices, which includes cellphones, tablets, desktops, or laptops.

Today I'll discuss with you who can use each method, how to access them, how to use SSIMWR, and MYWR, the benefits of electronic wage reporting and, lastly, other ways its users can report their wages.

First I'll discuss SSI Mobile Wage Reporting Application. Well, who can actually use the SSI Mobile Wage Reporting Application? SSI recipients and individuals as identifies as representative payees on the SSI record with their SSN may use SSIMWR. Institutional and organization payees are not able to use SSIMWR. Prior to either the SSI recipient or representative reporting wages, the employer has to previously been reported to SSA and established on the worker's SSI record. Once the employer is established on the SSI record, users can report the prior month's gross wages any day during the current month, but are encouraged to report wages during the first six days of the month. For example, if we're in December, users should report wages for November, preferably between December 1st and December 6th. Users may only report for the month prior to the current month.

When reporting wages via SSIMWR, the wage earner can only have one active employer on the SSI record. If there are two or more active employers on the record, the system will not be able to process that wage report.

After a successful wage report, a receipt is generated and mailed to the recipient and/or representative payee.

Now, there is some assistance to help users use the application. To assist the representative payees and recipients, there is an SSI Mobile Wage Reporting Training Packet that is available at the local field office. This package provides instructions to the user on how to access the

application and has monthly calendars to help them understand when they should report their wages.

Now, for them to be able to access the application, they would need to either have an Android or Apple mobile device. This includes cellphones and tablets. And they can download the application from either the Google Play Store Application or the Apple Store App, respectively. For users to locate the App, they can simply type in SSI mobile wage reporting in the search bar and select to download the application.

So, that's a pretty good overview of what SSI Mobile Wage Reporting is and does. And now I'll discuss My Wage Report, or MYWR.

Now, My Wage Report is the newest service available to users behind My Social Security portal. Wage reporting for SSDI beneficiaries and their representative payees through the MYSSA portal started September 23rd of 2017. This application allows SSDI beneficiaries and their representative payees to report wages online. As mentioned earlier, it is accessible via desktop, laptop, and mobile devices with internet capability.

It is important to note that only the person reporting wages needs a My Social Security account to access the application and representative payees are able to report wages but will not have access to the beneficiary's other information.

When reporting wages on line, SSDI beneficiaries and their representative payees will need to reference the paychecks for the pay periods they are reporting for. Required information when making a report includes frequency of pay, pay period start date, pay period end date, gross pay, and pay date.

So, once a user is ready to report their wages, they'll log into My Social Security account. The application will display a list of beneficiaries or representative payee if it is a representative payee that is doing the reporting. And, then, it will also display a list of employers that the SSDI beneficiary's wages can be reported on. Only employers with an open period of employment will be displayed to the users. If a beneficiary or employer is not displayed, there're instructions to the beneficiary or representative payee and the application letting them know to contact their local field office or call the 800 number.

After reporting wages online, SSDI beneficiaries and their representative payees have the option to either print or save a copy of their receipt.

As mentioned earlier, My Wage Report is a new application and we do have plans to increase its functionality. Right now people receiving retirement benefits, Medicare only, demonstration project participants, and SSI recipients and beamers are currently excluded from reporting wages through the MYWR application.

Now, to move on. Some of the benefits for reporting wages electronically include an easier and faster way to report wages to Social Security. Reporting wages electronically can help reduce the need to visit Social Security Office. And then timely wage reporting can also help to prevent improper payment.

If a beneficiary, recipient, or representative prefers not to report electronically or they are unable to, they may still report their wages by mail, phone, or fax.

And, with that, I'll go ahead and turn it back over to you, Joie.

Joie Hill: Thank you, Kayla for the information on the Mobile Wage Reporting tools and the Online Wage Reporting tool.

Next, I'd like to turn the call over to (Karen Bennett-Yates). Before I turn the call over to her, I'd just like to remind you to jot down your questions for our speakers. Okay, thank you.

(Karen Bennett-Yates): Thank you, Joie. As Joie stated, I will be giving you some information regarding internet appeals. I will discuss a little bit of the background, some of the benefits, and the functionality of the application.

IAppeals non-medical application was implemented on December the 16th, 2016. This application allows claimants and representatives to submit online appeals related to overpayments. Claimants can attach and submit documents electronically to support their appeals filed online. The applications will make it – or actually makes it – faster and easier for SSA to intake, assign, process, and track online appeals.

Some of the benefits of the application, externally, for the public's use, is that it allows the public to file non-medical or overpayment appeals online. It decreases the need for the claimant to travel to a field office. It will propagate the information that is input by the user throughout the application. It's easy to navigate and edit any information that's provided by the user. And the user will receive confirmation that SSA received the IAppeal submission.

Some of the benefits internally for the employees is that it will improve the tracking for the non-medical appeals. It will centralize the location to assign, organize, and track non-medical appeals. It reduces the needs for paper submissions. There is an attachment utility that will allow the claimant to attach any documents electronically. And it reduces the need for SSA employees to re-contact the claimant.

Some functionalities of the system is that it generates a confirmation of receipt after the overpayment appeal has been submitted. It archives cases with any uploaded documents for up

to a year. The customers have the ability to edit any forms or documents they submit with the online application. And it also allows the customers to upload any supporting documents, along with their submissions.

Some functionality for the employees is that the employees have the ability to review any of the documents and supporting documents that have been uploaded at the same time. It allows the employees to identify cases that have any uploaded documents. And it will allow for easy querying, viewing, printing, and marking cases as complete.

Thank you.

Joie Hill: Thank you. Next we will open up the lines for questions. Before we open up the lines for questions, I would like to remind you please do not provide any personally identifiable information, such as the Social Security number or any detailed case information.

Cecelia, can you please open up the line for questions?

Cecelia: Yes, ma'am. If you would like to ask a question, please signal by pressing Star 1 on your telephone key pad and the voice prompt on your phone line will indicate when your line is open. We ask that you please state your name and where you are calling from prior to asking your question.

Again, that is Star 1 to signal. And we'll take our first question.

Rhonda Savain: Hello?

Cecelia: Go ahead.

Rhonda Savain: Hi. You said don't state our name, just state where we're from, right?

Cecelia: Name and where you're calling from.

Rhonda Savain: Okay. My name is Rhonda and I'm calling from Pastry City, Georgia, and I usually do Mobile Wage Reporting for my son. He has Autism, but he does have a job. And one of the things that I have been having a challenge with and I did report it to several people is when they ask for the date of birth, there is no easy dropdown to do month, day, and year. So, my son happens to be 22 years old and he was born in May. So, I literally have to click back 271 times to get to May of 1995 to enter his date of birth as May 9, 95 and I think that that is absolutely ridiculous. I don't know if anyone else has ever reported this, but I have tried to report it several times.

So, if I was 65 years old, I don't know how many times I would have to click to enter the date of birth. But there's no dropdown where I can enter month, date, year. And, so, somebody that's disabled to try to have to do this is almost impossible. Did you ever hear about that before?

Joie Hill: Hi, Rhonda. This is Joie Hill from the Office of External Affairs and I'm going to have Miss (Kayla McNeil) address your question and thank you for that.

Rhonda Savain: Okay.

(Kayla McNeil): Hi, Rhonda. Yes, that issue has been identified and reported to Social Security. We are currently looking into that issue and how we can resolve it so that wage reporting is an easier process for those users using Android phones.

Rhonda Savain: Because my son, he would be able to do it on his own, but it's kind of challenging for anybody that even receives Social Security to click back. And, for him, he's only 22. So, if I'm

60, I don't know if you're sitting there every month clicking it, like, 500 times to get back to 1960 or something like – it's really, really, really a hardship. And this has been going on – he probably started about a year ago – and it's been going on ever since then. So, it's nothing that's even brand new.

(Kayla McNeil): Yes, ma'am. I understand that there was an update done to the SSI Mobile Wage Reporting application that added that date picker in. So, we are working with our systems to see how we can resolve the issue.

Rhonda Savain: Okay. Thank you.

Joie Hill: Thank you. Cecelia, can you transfer us to the next question, please?

Cecelia: Yes, ma'am. I'll take the next one.

Denise Hoffman: Hi, yes. This is Denise in Washington, DC. And I was wondering, does the My Wage Reporting app have the same limitation that the SSI app has in terms of just one employer at a time?

(Kayla McNeil): Hi, Cecelia. This is Kayla again. No. What the SSI Mobile – I'm sorry – the Mobile Wage Reporting application, multiple employers are available for a reporter to report on. So, in the process, you could go in and select the first employer. Complete that report. Once that report is completed, you can then be directed back to select the second or third employer that you want to report for. But, when you are reporting for multiple employers or any employer, you have to keep in mind that that employer first has to be reported to SSA and established on that individual's record.

Denise: Thank you.

Joie Hill: Thank you. Can we have our next question, please?

Cecelia: Yes, ma'am.

Lisa: Hi. My name is Lisa from Arizona and I just have two questions about if somebody is working, like an independent contract job, are they able to report online to the MYWR at all or no?

(Kayla McNeil): This is Kayla again. At this time, no. Self-employed or contracting employees are not able to report wages through the MYWR application. It's only for those that are reporting wages through a specific employer.

Lisa: Okay. And then, also, if they are reporting, does the system automatically generate a receipt for them?

(Kayla McNeil): Yes. It does. At the end of the reporting process, a user is able to see that receipt at the end of their submittal and then they can also either print or save that receipt to their own device that they're using. And then SSA also saves that receipt to our records.

Lisa: Okay. And then for a ((inaudible)) for the appeals, am I going to be able to find that under My Social Security or is that on the, just the, to go if you want to report, you know, if you want to file an appeal online? Is it going to be under My Social Security – a tab underneath there -- or where's it going to be at?

(Kayla McNeil): That is the plan for it ultimately to be behind the MySSA, but for right now you can access it with – by going on www.ssa.onlineservices.

Lisa: Okay. Dot online services, okay. Thank you.

(Kayla McNeil): You're welcome.

Joie Hill: Thank you. Do we have any other questions in the queue?

Cecelia: Yes, ma'am. We have several in the queue. We'll take the next one.

Gerry Dietrich: Hi. My name's Gerry Dietrich. I am a Work Incentive Planner with the VR Agency in California. And my question was about that training packet that's available at the Social Security Office currently. The Work Incentive Planners that work at the DOR offices are not authorized to go with consumers to talk about appeals at the Social Security Office. We're kind of like a point-and-shoot kind of thing when it comes to that, like, you can go over here for this. You can go over there for that.

But, it would be awesome if we could bring this service to our participants, you know, in our VR program, who are also SSI or SSDI consumers to help them in-house with this process at the DOR office. So, I was just wondering if how I order the training packets and if the Work Incentive Planners for the VR offices could get training on how to use these global and online apps to help our consumers.

(Kayla McNeil): Hi. I can answer part of that question. The other part we'll have to get back to. The part that I can answer is in regards to the training packet. The training packet that's at the Social Security Office is specific to SSI Mobile Wage Reporting application. They are at the field office because at the point of the field office contact looking individual, they can explain to the individual about reporting wages – when and how they should. And there's a recruiting process that we go through and, at that time, that's when we provide those training packets.

We will have to get back to you on the second part of your question as far as training packets that can be provided specifically to your office.

Joie Hill: And this is Joie Hill. If you could please send that question to us via email and I'm going to provide you with the email address. The email address is oea.net.post@ssa.gov and we will get back to you.

Gerry Dietrich: Okay. Perfect.

Joie Hill: Thank you.

Cecelia: I'll take the next question.

Carmelle Lowe: Yes. Hi. This is Carmelle calling from Olathe, Kansas. And I'm a Benefits Coordinator and so I'm kind of, like, at the beginning, trying to help people get started with understanding their benefits. And the very first thing that I need them to get is their Benefits Summary from the local Social Security Office. And that Benefits Summary is supposed to be free for benefits planning; however, a lot of the Social Security offices are very confused and they do not understand that it's free. Some do and some don't. And, when I did find one that did realize and understand that it was free for this purpose, I asked for some type of a memo number that I could reference or anything. And they told I wasn't allowed that. So, then, I end up, along with the client, being very frustrated trying to get this information for them so that they can get it to me for the benefits planning.

And I was wondering is there something that I can reference when – that I can tell the clients – this is what you need to get – which they know what they need to get – but when they go to the local offices, when the Social Security office personnel are trying to charge them \$50, \$75, \$150 for this information that's supposed to be free...

Hello?

I'm here. And did you hear any of my question?

Joie Hill: I heard all of your question. Please continue.

Carmelle Lowe: Okay, well, I just heard ringing on my line, so I wasn't sure what happened. So, anyways, I was just wondering if there was something that I could tell the clients to tell the office personnel in the local offices, yes, please check this page in the book or this memo so that they understand that it is free for them.

Joie Hill: Thank you for that. And you say your name is Carmelle?

Carmelle Lowe: Yes.

Joie Hill: Okay. I would like to throw this question to the staff in (ORDES) to see if they have an answer for that.

Female 1: Yes. This issue has come up, but I could email us at the email that was provided just a moment ago because we'd like to be able to give you a more detailed answer.

Joie Hill: Okay. So, I'll provide that email address again. It's oea.net.post@ssa.gov and thank you for your question, Carmelle.

Carmelle Lowe: Thank you very much.

Cecelia: I will take the next question.

Erica: Hi. My name is Erica. I'm calling from North Carolina. I'm a Credential (intelligible) Practitioner. And I usually accompany my clients to the Social Security Office in order to report their wages, have any questions, request a VPQI, or such. And I have a client, specifically, who they've been reporting their wages since January. And it wasn't until they earned too much money to receive their benefits that we started to receive problems. They were told we'd been keeping track of what the overpayment was and what the two-month after the wage reporting benefit amount would be, but when they – after they signed the agreement that they would pay back \$75 a month, they were told that they owed twice as much as they thought. We requested a reconsideration. We requested somebody to just sit down and explain the calculations with us. And they will not do that. They sent us – in response to the reconsideration – they simply sent us a letter stating you were overpaid this much money and you owe money and pretty much that's it. There was no recalculations and we think that there may be a miscalculation. The person understands that they do owe money. But, how do we get someone to say or just to sit down with us, just to go over the calculations, because the person feels that now that they have a decent-paying job, they're just being taken for their money because they have a decent-paying job.

Joie Hill: Okay. Thank you, Erica. I'm going to have this question answered by staff in our Office of Income Security Programs and (Darren Vern) with us.

(Darren Vern): Hi, Erica. Your question is pretty specific, so I think that it would be better to either go to the local office to get them to the calculation or you can email us and give us the specifics of the information and then we can work with our partners in operation to figure out with our partners that work in the field office to figure out the specific issue that you're looking at. It sounds like an overpayment calculation issue. And we have to take a look at the specifics of a case in order to address this. So, if you could email the email that Joie provided earlier, that would be best.

Joie Hill: Yes. And please provide your telephone number in there. Do not send us the Social Security Number of the beneficiary. And we'll make sure that we get that to you.

Erica: Okay. Great.

Joie Hill: Okay. Thank you.

Erica: Thank you.

Cecelia: We'll take our next question.

Gina: Hi there. My name is Gina and I'm from Santa Barbara. I have a question about the online appeals process. If we're submitting information, you know, additional documentation, I'm a little bit concerned that it might get treated as a case review, rather than, let's say, if someone requests an informal conference or a formal conference. I've actually had situations where people have requested informal conferences and never got a phone call to come in to Social Security to talk to a representative and the case is just treated as a case review. So, with this type of reporting, are cases going to be mainly treated as case review only, or if someone chooses an informal conference, is it going to be safe to just keep submitting information like this with the security of knowing that eventually they're going to get called in to talk to a representative?

(Kayla McNeil): Hi, Gina.

Gina: Hi.

(Kayla McNeil): My suggestion is that if it's related to an overpayment and the documents that are being submitted are for an overpayment, I would say continue to upload those documents and once the field office employees look at the information, they'll take the next appropriate course of action.

Gina: Okay. So, does that mean that they'll adhere to the, you know, what the beneficiary marked, meaning that they want the informal conference?

(Kayla McNeil): Correct. If that's what they're submitting...

Gina: Okay. Okay.

(Kayla McNeil): ...they're submitting, then the case will be processed as such.

Gina: Okay. Just wanted to make sure because, like I've said, I've seen it when we do it manually and we submit it with the Social Security Office, it actually has been processed as just a case review and, you know, the recourse was to go to hearing because the case had been decided. So...

(Kayla McNeil): Within the application, the claimant has the opportunity to explain what they would like to have done with their case. So, if they're specifying that it is a case review or it's not a case review, or whatever the situation may be, once the employee prints out that information and looks at it, they'll determine exactly what it is that the claimant is asking for. And, if they can't distinguish between – or if they can't determine what it is that the claimant is asking for – then they'll contact the claimant and ask for clarification.

Gina: Okay. Thank you so much.

(Kayla McNeil): You're welcome.

Cecelia: We'll take the next question.

Murray Shiel: Hello. My name is Murray. I'm calling from Washington, DC and I have a question about the My Wage Reporting system. Can My Wage Reporting be used by an appointed representative? In other words, I'm an attorney at work in a small legal practice that helps patients of our organization with the Social Security Administration. And, occasionally, our clients turn to us for assistance in reporting to Social Security. And we were wondering, as appointed reps, will we be able to use the My Wage Reporting system?

(Kayla McNeil): Hi. This is Kayla. No. Appointed reps are not able to use the My Wage Reporting application. Only representative payees and the actual beneficiary can use My Wage Reporting application.

Murray Shiel: Okay. So, we would have to have the actual beneficiary potentially sitting with us and they would log into their MySSA account and then we would go to My Wage Reporting and then they could input the wage report.

(Kayla McNeil): Yes. The beneficiary would have to be there with you and have their own MySSA account in order for that process to take place.

Murray Shiel: Oh, okay. And can this be used to report wages for supplemental security income, SSI, or is it just titled...

(Kayla McNeil): No. Right now only Title Two and SSDI beneficiaries can use the My Wage Reporting application. We are working on allowing Title 16 recipients, representative payees, and beamers to use our application as well.

Murray Shiel: And then, finally, is there a way to request Social Security to suspend a Title Two payment when the beneficiary knows that he or she has exceeded her nine-month trial work period?

(Kayla McNeil): The My Wage Reporting application will not allow you to do that. You would still need to follow the current business process for reporting a change such as that.

Murray Shiel: So, I guess it's my question – we've never had any luck at getting Social Security to suspend a payment in that case. Can you advise me how we could essentially do that, because we run into this a lot. And it causes the very kinds of overpayments that we're talking about here.

Joie Hill: We'd like for you to email that question to us. That's complicated and we'd like to make sure that we give you the proper answer for that one. Again, the email address for that question would be oea.net.post@ssa.gov and thank you for your question, Murray.

Cecelia: And, we'll take our next question.

Dawn Magnuson: Hi. My name is Dawn Magnuson. I'm in Superior, Wisconsin, and I'm a Work Incentive Practitioner. And I have a question in regards to the wage reporting. So, the lady indicated if unable to utilize online wage reporting, they can still fax and all the other options she gave. But, she did not mention in person. Is that no longer an option?

(Karen Bennett-Yates): Yes. That is still an option. Individuals can still go...

Dawn Magnuson: And I have one more question. Then, how, if they did the other methods, I'd have many instances where people have been told they did not report their wages and so I advise every single person I work with to request a receipt. And in the – if you fax or do other methods – is there a way to get a receipt?

(ORDES): Any time you report wages...

Dawn Magnuson: I'm sorry. I couldn't hear the beginning of your response.

(ORDES): This is (ORDES) responding. A receipt should be provided when you report wages. If you have not, that would be something that would need to be looked into. But you should suspect to get a receipt when wages are reported. It may be that, you know, that SSM was not provided with the report or something like that. But, otherwise, you should expect to get a receipt.

Dawn Magnuson: So, would that be something mailed to the consumer if they faxed it?

(ORDES): Yes.

Dawn Magnuson: Okay.

Joie Hill: Okay, thank you Dawn.

Dawn Magnuson: Thank you.

Cecelia: And we'll take the next question.

Maggie O'Brien: Oh, hi. This is Maggie O'Brien. I'm a Work Incentive Planner in Northern California for the Department of Rehab. And I am a little bit confused about – so, the pay – whether the actual recipient and the payee can both report or if one or the other has – can they both be on the account as people to report?

Female 3: Either one can report their wages, but they would both need to have their separate or separate My SSA accounts to report. So, the beneficiary is reporting, they could only log in with their My

SSA account to report. And if the representative payee is reporting for them, that representative payee would have to have their own My SSA account in order to report for a specific beneficiary.

Maggie O'Brien: So, is there ever a situation that the system would receive a double report for the same recipient?

Female 3: That is possible, but we would catch that on the back end once the report is made. We would not allow the double reporting to affect that individual's benefits.

Maggie O'Brien: Okay. Thank you.

Female 3: Thank you.

Cecelia: And we'll take the next question.

Judy Blake: Yes. My name is Judy and I'm calling from Houston. I was wondering, I fax in the Mobile Wage Reporting – or, excuse me – I fax in my son's statements from his employer. Am I also allowed to fax in the, any (IRWE) expenses? Or does that have to be done in person? And, also, is it possible this information is available in written form, because the one part that was kind of stacey I had trouble hearing what the lady was saying and it would have helped to have it written out.

Joie Hill: If you could please send that question to us in email, we'll have to get back to you on that one. We have to do some research.

Judy Blake: Oh, about the (IRWE)?

(ORDES): This is (ORDES). You should be able to fax in any kind of impairment-related work expenses, along with the pay stub.

Judy Blake: Okay. And it's interesting because I was faxing it in and then, like you mentioned before, they had said that I – we were then overpaid. So, then I went in person and it showed where I faxed in everything and I was told by my local office, well you know, we're very busy. We get hundreds of faxes a day. And I said, okay, but I sent them in. I want you to believe me. "Oh, we believe you. We just want to get it straightened out."

So, it's become this huge mess because, apparently, they're so overwhelmed at the local office that they're not able to keep track of what's being faxed in and then I' overpaid and then we're underpaid, and then we're...it's just this continuous cycle. Fortunately, I haven't had to pay anything back. But it just varies widely as to what we get each month because they seem to be very overwhelmed at my local office. So, unfortunately. But I should be able to fax in the (IRWE)?

(ORDES): You should be able to fax that in. If you are having issues with specific cases, you're more than welcome to email us and, you know, we can help to try to provide some guidance on that.

Judy Blake: Okay. And was that the oea.net? And is that dot "p" as in Paul, "ost"?

(ORDES): Yes.

Judy Blake: SSA.gov. Okay. All right. Well, thank you very much. I appreciate your help. Is there any way to get – oh, you already answered that. Thank you very much. I appreciate it.

(ORDES): You're welcome.

Cecelia: We'll take the next question.

Shannon Stewart: My name's Shannon. I'm calling from Seattle, Washington. And I have, I guess, it's kind of a three-part question, but they're all related. Based on what I heard you guys saying, it sounded like you were recommending even people who are on SSDI report their wages monthly. And, we had been advised previously that only SSI recipients need to provide their gross pay monthly. So, I was hoping to have that clarified.

And, then, if you want to start there, we can. Or I can lay the other two questions out to you – whichever you prefer.

Joie Hill: I'd like to get an answer to your first question. Then we'll take your second question.

Female 4: You were correct in what you were thinking is that with SSI because that payment can change on a monthly basis, depending on what the earnings are, that it is important, you know, to know those monthly earnings. However, with Social Security Disability, SSDI, we need to know when you started, stopped, or there's a change in payment. So, you don't necessarily need to report monthly – only if, you know, there's been a change that we need to know about.

Shannon Stewart: Okay. So, that being said, I mean, I do support a number of individuals who work and their schedule changes. They're on SSDI, but their paychecks vary from month to month based on the number of hours they're working, which just happens to fluctuate. So, in those cases, would you recommend that we advise people to be reporting their wages monthly, in that case? Or, is it assumed that SSDI is going to be just kind of taking an average over the course of the year?

Female 4: We often do use averaging. However, there's specific rules to averaging and so, if you have somebody that has, you know, large fluctuations that is showing a change in their earnings, you

know, we would need to know about that. And, so, if reporting those to us would, you know, might help, and, so, again, if there's a fluctuation – if there's a change – we're still going to send that, you know, the SSA821 to that individual to ask them more questions about that and they have due process as well before we would make any changes to their benefits. So, you know, if there is a change that we need to know about, you know, we're not going to make a decision on that case until we've contacted the beneficiary.

Shannon Stewart: Okay. And, then, also I know for the – I'm excited that you guys now have an SSDI online way with reporting option. My curiosity about that is I know that SSDI's more interested about when the money was earned, rather than when it was paid. And, so, I know you'll be giving date ranges for each pay stub. But, then, there was also going to be an option to type in the gross amount. And, I'm just a little bit confused of how you're going to be expecting the beneficiaries to calculate their gross amount when most frequently we have pay stubs that range two months. And most individuals can't break it down to understand based on what was earned each day.

Female 4: When someone is using the My Wage Report application, they can enter the pay – enter their wages by pay period. So, that information should be on their paycheck or should, hopefully, be on their paycheck so that they can enter the pay period start date, as well as the pay period end date. And they're not asked to calculate the total gross for the month. So, they're entering it as a pay period, or a per paycheck.

Shannon Stewart: Okay. I guess I misheard it. I thought someone said there was also a question asking for gross on the SSDI also, so thank you for clarifying that. And then, the last question I had was we've been told by our local office that mailing pay stubs is not appropriate and, I think, similarly to the last question, it's been told to ask that it's not appropriate because they simply can't keep up with it and then we're getting back payments. And we're saying, well, we reported. And they're, like, we'll, you didn't report appropriately is what we're being told as a result of having

mailed things in. So, it sounds to me like you guys are advocating that mail is an appropriate way of reporting and that should be considered legitimate. Is there any reason for me to believe otherwise, aside from my local office's statement?

Female 4: You should be able to mail in pay stubs. Again, if you're having a specific issue, you know, we encourage you to email us so that we can try to route those questions accordingly. But, you know, you should be able to mail in or fax pay stubs.

Joie Hill: And, when you submit your question to the oea.net.post email box, please do not include any Social Security Numbers, but provide us with your telephone number so that in case we need to contact you directly, we will do that, okay?

Shannon Stewart: oea.net.post and what's the rest of it?

Joie Hill: @ssa.gov

Shannon Stewart: Okay. And just of general feedback around that process, I think it – what I'm hearing just even on this call – that that tends to be a challenge – all the different ways that are technically allowed for reporting, but that local offices have trouble managing. That ends in overpayments. Over time, hopefully, maybe some ways can be streamlined because it seems like that's a real challenge and it comes out in a way that really ends up terrifying beneficiaries sometimes and works in the reverse of helping people continue to be employed, you know, because it's a scary thing to have happen.

Joie Hill: Thank you very much for your comment. Cecelia, can you prompt us for the next question, please?

Cecelia: I sure can. We'll take the next one. Caller, go ahead.

Michelle: Hi. This is Michelle. I'm calling from New York. I have a client that has tried to do the call in with the SSI Mobile Wage Reporting. And they have kind of a thick accent and the phone apparently – the translation – it can't hear them or it can't parse their words and so it's impossible for them to use the phone. Is there a way to do it by texting with that wage application? Or they just can't use it if it can't understand what they're saying.

Female 4: The application you're referring to is the SSI Telephone Wage Reporting application and that application does have difficulty understanding thick accents. The option that they would have would be to use SSI Mobile Wage Reporting application. That's where they can download the app in the App Store and then type in the information. That way they can report their wages without having to go to the field office.

Michelle: Okay. And I just want to just take a second and support what the prior – right before me – the woman said about trying – people really trying hard to report things on time and get them in the system and that it's still generating overpayment because even if they reported on time, it doesn't actually physically get in the system at the local office and it is really nerve-wracking for people, especially if they have already mental health issues. So, I just want to plug her desire that, you know, this gets streamlined and isn't so traumatic for people, because it really makes them not want to work because of this problem.

Joie Hill: Thank you very much for sharing that view – you who raised that. We apologize for the extra work that's involved and we will take your concerns into consideration. Okay, thank you. Can you send us to the next call, please?

Cecelia: Yes, ma'am. Next question.

(Jen): Hi. This is (Jen) calling from Minnesota. I have two questions, please. For the telephone wage reporting or Mobile Wage Reporting, can a person be concurrent and use those systems?

Female 4: A person can be concurrent and use the SSI telephone wage reporting or SSI Mobile Wage Reporting application, but Title 16, because that's what it's geared toward, they will actually go ahead and update their record. But there is a diary that's set for the Title Two portion of that record.

(Jen): Okay. Thank you so much. For the SSDI online reporting – the new one on the My Wage Reporting – do they have to call in the 800 number first for every new job before they can use the online system for reporting wages?

Female 4: Whenever someone starts working with a new employer, that employer would have to be reported to SSA and established on that person's record before they could report, because if they haven't reported and it's not established on SSA records, when they go in to use the application, they won't see that employer to report for.

(Jen): Thank you so much.

Joie Hill: Cecelia, this is Joie Hill. We'll take one last question, because we are running over our time.

Cecelia: No problem. We'll take the next question.

Irene Romo: Yes, I'm Irene from Sacramento. I have a question. I heard that my account, for wage reporting for SSDI, they don't allow you to use the work incentives. Is that correct? Like trial work period, EPE?

Female 4: So, when you report earnings through your My Wage Report online, when we receive those earnings, if there's any indication that those earnings are SGA and could result in a cessation, we are following up in the same way we would do if you docked in or mailed in wages. We would send that SSA821 or SSA821, that asks about all of those work incentives and give the person a chance to provide us any kind of proof that impairment-related work expenses, et cetera, before we would make any decision on the case. And, so, we would still take into consideration all the trial work period, EPE, all the work incentives that currently apply would continue to apply in this situation.

Irene Romo: Okay. So, they can go ahead and wage report even if they're in the work incentives and then we would just do the 821 and help them identify their work incentives they're using.

Female 4: Correct. Because, as you know, not all wages are, you know, you know, over what we call the substantial gainful amount, and so not all of them would need to be addressed for work incentives. But, if they do need to be addressed for that, we would give the person the same avenue to report those to us as we do now.

Irene Romo: Okay. Sounds great. Thank you.

Female 4: Thank you.

Joie Hill: Okay. Thank you very much. This is Joie Hill, again, and we apologize that we haven't been able to take all of the questions. We are glad to know that this topic has been of interest to all of you on the line. I'd like to send a huge thanks to all of our speakers and to all of the participants today.

We will be sending an email to everyone who registered for the call today with information on all of the resources that were mentioned. Within approximately two weeks, there will be a transcript

and an audio recording of this call on our Web site. The Web site address is www.ssa.gov/thirdparty/whatsnew.html. Again, that Web site address is www.ssa.gov/thirdparty/whatsnew.html. The Web site will also be in the email address that you will receive.

Again, we thank you very much for your time. We'd like to wish you a happy holiday season and a great rest of the day. Thank you.

Cecelia: Again, this does conclude today's conference. We appreciate everyone's participation today. You may now disconnect.