Payback Information Management System (PIMS) Frequently Asked Questions

Introduction to the Payback Information Management System (PIMS) FAQs

In 2017, the Rehabilitation Services Administration (RSA) contracted with AnLar and Westat to establish and maintain the Payback Information Management System (PIMS). The main objective of the PIMS is to collect and analyze data on scholars funded by Rehabilitation Long-Term Training (RLTT) grants for use in reporting RLTT program performance measures required by the Government Performance and Results Act (1993) and to track the service obligations of scholars funded by RLTT. In order to facilitate this process AnLar and Westat developed the PIMS, a secure, online database to collect contact information, educational training, funding awarded to institutions of higher education (IHEs), and employment from participating scholars. PIMS replaced the RSA Management Information System (MIS) that was solely used by grantees in years past.

The following guidance document addresses questions frequently asked by universities, scholars, and employers, specifically regarding use of the PIMS. Frequently Asked Questions related to program regulations are available on the PIMS website at https://pdp.ed.gov/RSA/Home/regulatoryfaqs and https://pdp.ed.gov/RSA/Home/Regulation. You may also contact the PIMS Help Desk at https://pdp.ed.gov/RSA/Home/contactus for additional assistance.

General Information

1. What is the Payback Information Management System (PIMS)?

The Payback Information Management System (PIMS) is a secure, online database used to collect training information on scholars and track the fulfillment of their service obligations. The PIMS can be found at https://pdp.ed.gov/RSA. The PIMS has three types of users: Project Directors, also referred to as grantees, scholars, and employers. Project Directors are responsible for accurately entering the contact information, training and service obligation details of funded scholars. Scholars verify initial contact information entered, update as necessary, and enter employment information to meet their service obligation. Employers are responsible for accessing the PIMS, once alerted, to verify the employment of scholars.

2. How can you learn more about the PIMS?

The PIMS is funded by the Rehabilitation Services Administration, Training Programs Unit at the U.S. Department of Education (ED). Regulatory and technical assistance to the PIMS users is available through the Help Desk, which is open Monday through Friday from 8 a.m. until 8 p.m. ET. The PIMS end-users may contact the Help Desk by calling the toll free hotline at 1-800-832-8142 or via e-mail at RLTTHelpDesk@ed.gov.

Website Access

3. How do I change my password if I forget my password or my password has expired?

Click on “Forgot Password?” located on the login screen (https://pdp.ed.gov/RSA/logon/Login). You will be prompted to enter your email address. Then you will be sent an email with a link and Authorization Key. The link will take you to a page where you can enter the Authorization Key and create a new password.

4. What is multifactor authentication (MFA) and how can I set it up?

MFA is a security process that requires users to verify their identity in multiple ways to gain system access. The use of MFA greatly reduces the chances of unauthorized access to accounts thereby protecting personally identifiable information (PII) and significantly reducing the risk of a system-wide data breach. For instructions on how to set up MFA on your smart device, please review the resources available in PIMS at https://pdp.ed.gov/RSA/Home/Training.

5. I tried to log in to the website and it said my account is locked. Why did this happen and how can I gain access to my account again?

For security purposes, the PIMS user accounts lock after the username or password has been entered incorrectly three times. Your account will be unlocked after an hour and you will be able to login.

6. I was logged on to the PIMS and left my desk for a half hour. Why wasn’t I able to continue entering data when I returned?

As a security precaution, if your computer is not used for more than 30 minutes, the system will automatically log you off.

<u>Operation of System by Scholars</u>

7. How do scholars create their account in the PIMS?

After the Project Director submits scholar records in the PIMS, scholars are sent an automated invitation e-mail providing them with instructions on how to log into the system and create their account. The instructions are also found below:

1. Click the secure link within the e-mail
2. The secure link will direct you to a page in the PIMS where you will enter the "Authorization Key" provided in the e-mail
3. On this page you will also create your password
4. When the password has been created, click "Register"
5. You will then be directed to the login page
6. Enter your e-mail address and the password you just created
7. At the initial login, you will see the "Rules of Behavior for U.S. Department of Education-Sponsored Website" page. Review the information thoroughly. You must agree to the terms by clicking on "I Agree to the Terms" at the bottom of the page before proceeding
8. Upon first login, review and certify your contact and service obligation details

Once scholars have created their PIMS account they may log into the PIMS from the PIMS website at https://pdp.ed.gov/RSA. Scholars will use their e-mail address and the password they specified when creating their PIMS account.

8. I would like to use a different email address to log in to my account. How can I change my email address in the system?

Scholars may log in to PIMS to update their contact information at any time. Once logged in to the system, go to Section A. Identifying Information, and click on the link "Edit my information" on the right-hand side of the section heading. Enter the primary email address you would like to use in the appropriate boxes, and click the "Update" button on the right.

9. How do scholars enter employment information in the PIMS?

Scholars enter their employment information by completing the Employment Record Form in the PIMS. Note, only scholars who have graduated or exited from their training program have permission to enter employment records.

To enter an Employment Record follow the instructions below:

1. Log into the PIMS at https://pdp.ed.gov/RSA/Logon/Login.
2. On the "Scholar Main Menu" navigate to Section F. "Eligible Employment" and select the hyperlink "Add Employment Record."
3. Scholars will be directed to the Employment Record Form.

The Employment Record Form contains two parts. The first asks for contact information of the employer and the second asks for details of the position. The employment record(s) may be saved and edited at a later date by selecting "Save for Later" at the bottom of the form. To submit an Employment Record Form, scholars must select "Save and Submit" at the bottom of the form. Once an employment record is submitted, an automated notification e-mail is sent to the Project Director for approval. After the employment is deemed acceptable, the employment record will be sent to the employer for verification.

10. If I'm not working in a state vocational rehabilitation agency, what information should I include in the Description of Duties section of the Employment Record?

If scholars are not working in a state vocational rehabilitation (VR) agency, they **must** include in the job description whether or not the agency they work for has a formal agreement with the state VR agency. If the agency does not have a formal agreement, the scholar must also include if the agency receives referrals from the state VR agency or if the agency refers clients to the state VR agency. Failure to provide this information may delay the verification process or cause the record to be deemed ineligible for service payback.

11. I need to update information on an employment record I recently submitted. Why can't I edit my employment record?

Once employment records are submitted through the PIMS, Project Directors have a 15-day window and employers have a 30-day window to review the information and complete the verification request. Scholars may not edit their employment records during this window. If the Project Director and/or employer does not complete the verification request within the window, the verification request link will expire. Scholars may edit and re-submit their employment record after the verification window has expired.

12. Can I edit past employment records?

Employment records for positions that have ended cannot be edited by scholars unless the Project Director does not approve the employment as acceptable for service obligation or the employer disputes the employment record. Please see Questions 14 and 15 for handling employment records that are not approved as acceptable or disputed by the employer.

13. **If I remain in the same position from one year to the next, do I have to create a new employment record each year?**

Scholars do not need to create a new employment record each year if the scholar remains in the same position; however, scholars must submit employment for verification each year in order to obtain credit towards fulfilling their service obligation.

- **If there have been no changes to the position since the last time the scholar submitted his/her employment record he/she can** check the box "I am within my grace period or do not have any changes to my employment at this time" at the end of Section F. Eligible Employment, and click the "Update" button **to resubmit the record for verification.**
- If there have been changes to the scholar's employment position, for example, the title or job duties have changed, click on "View All Employment Records" in Section F. Eligible Employment. Click on the name of the employer the scholar wants to update the record for and make any edits to the record and click "Save and Submit" to submit the record for verification. If the employment position has ended the scholar must open the employment record, add an end date and resubmit the **record for verification.**

14. **What if my Project Director does not approve my employment information as acceptable for service obligation?**

Scholars should communicate with their Project Director prior to accepting a position to discuss whether it meets the qualifying employment criteria. Scholars will be notified via email if the Project Director does not approve an employment record. Scholars should login to PIMS to review the reason(s) for the decision. After addressing the concerns raised by your Project Director, please log in to your account in the PIMS and edit the information on your employment record as needed and resubmit it for verification. Employment verification requests will not be submitted to the employer until the employment record has been approved by the Project Director.

15. **I received an e-mail indicating that my employment record was disputed by my employer. How can I resolve this?**

An employment record is considered "Disputed" when the employer does not agree with one or more of the answers provided by the scholar. Scholars may review the reason(s) for the dispute in the PIMS. To do this, on the Scholar Main Menu, scroll down to Section F. Eligible Employment, and click "Employment History." On the Employment History page click on the "Dispute" link next to the employment record in question. After reviewing the reason(s) for the dispute, scholars are encouraged to contact the employer to address the dispute, if needed. Once addressed, scholars may make any necessary changes to their employment record and re-submit it for verification.

16. **When I try to submit my employment information I receive the following message: "Employment start date cannot be prior to the date scholar completed/exited the program." How can I submit my employment?**

According to the program regulations (**34 CFR 386.40(b))**, scholars may begin submitting qualifying employment for verification only after completion of or exit from the training program for which scholarship assistance was received. Scholars may not submit current employment for verification while they are enrolled in the program.

17. When I try to submit my employment information I receive the following message: "A past employment record was found that was within the same period as the provided end date." What does this mean?

Scholars may not enter more than one full-time employment record, or a full-time and part-time employment record, with overlapping time frames. Please contact the PIMS Help Desk at 1-800-832-8142 or email RLTTHelpDesk@ed.gov for further assistance.

18. What if my employer won't verify my employment?

The employment verification process must be completed within the PIMS to track the scholar's fulfillment of his/her service obligation. If an employer is unable to complete the employment verification online within the PIMS, the scholar or employer should contact the PIMS Help Desk by calling the toll free hotline at 1-800-832-8142 or via e-mail at RLTTHelpDesk@ed.gov**.**

Operation of System by Grantees

19. How does a Project Director or secondary user create their account in PIMS?

After a Project Director or secondary user is added to the PIMS (see Question 20 below for instructions on how to add a secondary user), an automated invitation e-mail will be sent to the Project Director with instructions on how to log into the system and create an account. The instructions are also found below:

1. Click the secure link within the e-mail.
2. The secure link will direct you to a page in the PIMS where you will enter the "Authorization Key" provided in the e-mail.
3. Create your password then click "Register."
4. You will then be directed to the login page.
5. Enter your e-mail address and the password you just created.
6. The first time you login you will see the "Rules of Behavior for U.S. Department of Education-Sponsored Website" page. Review the information thoroughly. You must agree to the terms by clicking on "I Agree to the Terms" at the bottom of the page before proceeding.

Once the Project Director has created a PIMS account, the user may log into the PIMS at https://pdp.ed.gov/RSA/Logon/Login. Users are to use the e-mail address and password they specified when creating their PIMS account.

20. How does a Project Director provide a secondary user access to the PIMS?

Project Directors may add one secondary personnel account per grant in the PIMS by following the instructions below. A secondary user is a person at the university who has access to the scholars' information and will be able to add and edit scholar records in the PIMS. However, the Project Director remains responsible for the accuracy and completeness of all data entries.

a. Log into the PIMS at https://pdp.ed.gov/RSA/Logon/login.
b. On the "Main Menu" page, locate the "Grant Personnel" section and select the link – "Add personnel."
c. Complete all the required fields including, Name, Last Name, and E-mail.
d. Select the "Save" button at the bottom of the page to add the personnel to the grant profile.

e. On the "Main Menu" page, locate the "Grant Profile Summary" section and select the hyperlinked "Grant Number" that you want the secondary user to access.
f. On the "General Info" Page for that grant, go to "Select the Secondary User for this Grant."
g. From the drop down menu select the name of the personnel you want to assign as the secondary user for the grant.
h. After selecting the correct name select the "Edit Grant" button at the bottom of the page. You have now successfully added a secondary user and will be directed back to the "Main Menu" page.

Once a secondary user is added in the PIMS, he/she will receive an automated e-mail notification with instructions to create a PIMS account. Secondary users login using their e-mail address and the password they created. This process can also be facilitated by contacting the PIMS Help Desk at 1-800-832-8142 or via e-mail at RLTTHelpDesk@ed.gov.

21. How does a grantee enter information and create a scholar record in the PIMS?

Project Directors or assigned secondary users may add scholar records in the PIMS. The scholar record consists of contact, training and service obligation information. Once information is entered, scholar records may remain in a "Pending" status in the PIMS for up to 30 days (see Question 21). To add a new scholar record in the PIMS please follow the instructions below:

1. Log into the PIMS at https://pdp.ed.gov/RSA/Logon/login.
2. On the "Main Menu" page, locate the "Scholar Information" section and select the link – "Add New Scholar Record."
3. Enter the Social Security Number of the scholar you want to create a record for, then click "Check If Scholar Already Exists." If the scholar is already in the system and associated with another grant, the scholar's demographic and contact information in sections A through C will automatically populate on the Scholar Record Form.
4. Complete all required fields (those marked with asterisks) in the Scholar Record Form. Pre-populated fields are editable.
5. Select "Save and Submit" or "Save for Later."

22. How does a grantee update a scholar's record in the PIMS?

Project Directors or assigned secondary users may update existing records for enrolled scholars. Records for completed/exited scholars cannot be edited by grantees. These records can only be edited by PIMS staff. To update an existing record for an enrolled scholar in the PIMS please follow these instructions below:

1. Log into the PIMS at https://pdp.ed.gov/RSA/Logon/login.
2. On the "Main Menu" page, locate the "Scholar Information" section and select the link – "View All Scholar Records."
3. Click on the name of the scholar you want to edit.
4. Update the scholar's record.
5. Click "Save and Submit."

23. What do the "Save and Submit" and "Save for Later" buttons mean on a scholar record?

After creating a scholar record, the record submission status can be either pending or submitted.

- Pending scholar records are those that have been "Saved for Later" and have not been submitted to the PIMS for processing. Scholar records should remain in a pending status for no more than 30 days.

- Once grantees enter all required information for a scholar record and select the "Save and Submit" button, the record is processed in the PIMS and the scholar will receive an automated invitation e-mail providing him/her with instructions on how to log into the system. Submitted scholar records for enrolled scholars can be edited. Submitted scholar records for completed/exited scholars can only be edited by PIMS staff and with the authorization of the university to ensure data integrity.

24. I started entering data on a scholar record but do not have all the information. Can I save the record and continue entering the data at a later time?

Grantees may save the information entered in a scholar record by clicking "Save for Later" and return to it at a later time to complete the data entry. Once a scholar record is saved for later, the record status will be listed as "Pending." Scholar records should not remain in "Pending" status for longer than 30 days. Scholar records that are not submitted after 30 days will be identified by PIMS Help Desk staff and a reminder notification will be sent to Project Directors to submit the records.

25. Can I create a scholar record for a scholar before he/she enrolls in the training program?

Grantees should not create a scholar record until the scholar enrolls in the program and funding has been disbursed to the scholar. Grantees are required to complete the Payback Agreement with the scholar and upload the signed agreement to the scholar record in the PIMS once the record has been created.

26. Why can't I edit a scholar record?

Submitted records for completed/exited scholars cannot be edited by grantees. These records can only be edited by PIMS staff. If you require assistance, please contact the PIMS Help Desk at 1-800-832-8142 or via e-mail at RLTTHelpDesk@ed.gov**.**

27. As Project Director, may I redact the scholar's social security number (SSN) on Payback Agreements and Exit Certifications?

Grantees must adhere to all institutional and Federal regulations on managing sensitive personally identifiable information, such as the scholar's social security number (SSN). After the Project Director enters each scholar's SSN into the PIMS, the Project Director must redact the scholar's SSN from the Payback Agreements prior to scanning and uploading the document into the PIMS. When the scholar exits his/her program of study, the Exit Certification must be handled in similar fashion. All original Payback Agreements and Exit Certifications must be retained with the original grant folder, safely secured, by the grantee and stored according to institutional guidelines until all scholars have completed their service obligations. RSA payback regulations specifically state that grantees will maintain accurate and complete records as for a period of time not less than one year beyond the date that all scholars who were provided financial assistance under the grant complete payback.

28. How do I decide which scholars to report data on?

You must report on all scholars who received funding from your RLTT grant-supported training program.

29. Do I report scholars who participated in my institution's training program but did not receive RSA funds?

No. You should report only scholars who were enrolled in your RLTT grant-supported training and who received scholarship support. For any year that the scholar was not enrolled in the training, you must indicate that the scholar was not enrolled in the training in the PIMS Section F, Items 4 and 6.

30. My grant ended at the end of the fiscal year, and I did not receive a no-cost extension. Some of my scholars are still enrolled in our training program, but will no longer receive RLTT support. How should I report these scholars' status at the end of the grant?

Grantees are required to report on every scholar who received financial support. If your grant ends and the scholar is still enrolled, you must continue to report on the scholar's status until the scholar exits the training program.

31. How do I report a scholar's status at the end of the year if the scholar will continue in my institution's training program, but will not receive RSA funding? The scholar was funded in the last fiscal year but will not be funded in current fiscal year, although my grant has not ended.

In Section G, Question 1, you should indicate that your scholar is still enrolled, but no longer receiving RLTT funding. If the scholar has not completed the program by the time the grant ends, you must continue to report on the scholar's status until the scholar exits. After selecting "The scholar is still enrolled in the program but is no longer receiving RLTT funding," please indicate in the text box that the grant has ended and enter the date the scholar is expected to graduate. When the scholar graduates, you **must** go back into this grant and update the scholar status in Section G, Item 1, and obtain and upload a signed Exit Certification.

32. When do I exit scholars?

You should exit scholars who have completed their RLTT-supported training program or exited the program prior to completion. Exiting means indicating the program completion status of the scholar in Section G, Question 1 as "The scholar exited/graduated/completed the program" or "The scholar exited without graduating/completing the program." You should also exit scholars who took a leave of absence with a status of "exited without graduating/completing the program." If these scholars return to the program later, you can contact the PIMS Help Desk to reactivate the scholars and continue to report on them.

33. Does entering scholar data on this website meet all of my reporting requirements? Will I still need to submit Annual Performance Reports (APRs) and Final Reports?

The scholar data reporting does not replace the required Annual Performance Report (APR) for continuation funding nor the Final Report due 90 days after the end of your project. Grantees must submit their Annual Performance Reports according to the schedule established each year by RSA and their required final reports at the end of the project. The website is http://www.g5.gov. Please call the G5 hotline at 1-888-336-8930 or contact your RSA Project Officer with any questions regarding Annual and Final Performance Reports.

34. Who is responsible for collecting and ensuring the accuracy of the scholar data reported on my grant?

It is the responsibility of the Project Director to collect and verify scholar data. Only Project Directors can submit scholar records in the PIMS.

35. Instead of entering data on this website, can hard copies of the forms be sent to PIMS staff or RSA?

No. RSA does not accept hard copies in lieu of entering data online.

36. What do I do if I cannot meet the deadline for entering my scholar data?

PIMS staff does not grant extensions for the submission of scholar data. All time extensions must be approved by the RSA Project Officer. According to 34 CFR 75.253(a)(3), the timely submission of reports is one of the factors that the Secretary will consider in determining whether to continue your project's funding for next fiscal year. According to section 75.217(d)(3)(ii), the Secretary can also consider the failure to submit scholar data in a timely fashion in determining your project's ability to obtain future grants from RSA or under any other Department program.

37. What do I do if I have not collected all of the required data for each scholar?

Project Directors are responsible for the quality and completeness of the data provided for their grants. Please obtain the missing data, by sending a letter, emailing, or telephoning the scholar. Project Directors must develop, if needed, an efficient method for collecting all required data from all scholars in their program.

38. What is acceptable proof of citizenship documentation?

Grantees must obtain and upload **two forms of identification**, consistent with the U.S. Department of Homeland Security standards, to demonstrate proof of citizenship. In addition to an **unredacted** social security card, please include one of the following: the scholar's birth certificate, State-issued driver's license or non-driver's identification card, or U.S. Passport. Grantees are reminded of guidance found at 396.33 (2)(i) and (ii), which discusses the requirements grantees must ensure before disbursing funds to a scholar. This section particularly states that grantees must obtain documentation that shows that scholar is a permanent resident of the United States and is not in the United States for other than a temporary purpose with the intention of becoming a citizen or permanent resident.

Verification from the Social Security Number Verification Service (SSNVS) cannot be submitted, as it is not an approved source/method for RSA scholars.

39. Is our university record system sufficient to document eligibility if we do not collect the Certification of Eligibility in Certain Program form?

No, the Certification of Eligibility form is a required form by the U.S. Department of Education that certifies whether a debt to the federal government is owed and if so it is in good standing. A grantee's university record system does not meet or replace this requirement of a signed form. As stated in the regulations:

§386.33 What are the requirements for grantees in disbursing scholarships?

Before disbursement of scholarship assistance to an individual, a grantee—

(f) Must obtain a Certification of Eligibility for Federal Assistance from each scholar as prescribed in 34 CFR 75.60, 75.61, and 75.62.

40. What are grantees' responsibilities for verifying scholar's employment information?

Project Directors are responsible for verifying that a scholar's employment meets the eligibility criteria. Once a scholar submits his/her employment record in the PIMS, the Project Director will receive an automated e-mail notification requesting approval. After the Project Director approves the employment record, an automated notification e-mail is sent to the employer requesting verification.

41. How do Project Directors approve a scholar's employment as acceptable for service obligation?

Once a scholar submits an employment record for verification, the Project Director will receive an automated e-mail notifying him/her that an employment record is pending his/her approval. To review the employment record, follow these steps:

1. Log into the PIMS at https://pdp.ed.gov/RSA/Logon/login.
2. On the "Main Menu" page, locate the "Scholar Information" section and select the link – "View All Scholar Records."
3. Click on the “Employment” link associated with the scholar you are reviewing.
4. Review the information the scholar provided about his/her employment and position and indicate whether you approve or do not approve the employment as qualifying employment. You are required to indicate whether or not you approve the employment within 15 days of receiving the email notification. You will receive a reminder email if you do not indicate whether or not you approve the employment within 15 days.
5. If the record is approved, the system will send the employer an automated verification request e-mail. If the record does not meet the qualifying employment criteria and the Project Director does not approve it, the system will send the scholar an e-mail notification.

42. I recently approved a scholar’s employment record as eligible for service obligation fulfillment. Why did I receive another email request to approve employment for the same scholar?

Scholar employment must be approved by the Project Director before the employer can verify the information. If an employer disputes the information submitted, a scholar is responsible for communicating with the employer to discuss the reason for the dispute and re-submit the record for approval by the Project Director and verification by the employer. Further, scholars must create a different employment record for each employment position (e.g., if a scholar changes jobs) and submit it for approval and verification. Project Directors will receive a separate email for each employment record submitted.

43. I am no longer the Project Director for this grant. How can I update PIMS with the new Project Director information?

Please email us the new Project Director’s name, email address, and phone number to RLTTHelpDesk@ed.gov.

<u>Operation of System by Employers</u>

44. How do employers complete the verification process?

Once a scholar submits an employment record through the PIMS, an automated notification e-mail is sent to the Project Director for employment eligibility approval. After the Project Director approves the employment record, an automated notification e-mail is sent to the employer requesting verification. The e-mail includes a link to the Employer Verification Form. The employment verification process must be completed within the PIMS to ensure the confidentiality and integrity of data reported. If employers are unable to complete the employment verification online within the PIMS, employers should contact the PIMS Help Desk at 1-800-832-8142 or via e-mail at RLTTHelpDesk@ed.gov.

45. When I click on the verification link in the email, I receive a message indicating that the employment record has already been verified/disputed. What does this mean?

Scholars are encouraged to enter two contacts on their employment record, a Supervisor and/or a Human Resources Official. If you receive a message indicating that the employment record has already been verified/disputed, the record was verified/disputed by the other contact listed on the employment record and there is no further action needed.

46. When I click on the verification link, I receive a message indicating that the employment record has expired. What does this mean?

Once employers receive an automated verification request e-mail, for security reasons they have 30 days to complete the verification form before the link expires. If multiple verification request e-mails are received for the same scholar, employers should be sure to access the most recent e-mail received to ensure the link has not expired. Employers should contact the PIMS Help Desk at 1-800-832-8142 or via e-mail at RLTTHelpDesk@ed.gov if the link has expired.

47. I recently completed an employment verification request for a scholar but received another verification request. Do I need to complete the verification request again?

The system automatically sends a new verification request e-mail every time the scholar indicates there is a change in their employment record. Please contact the PIMS Help Desk at 1-800-832-8142 or via e-mail at RLTTHelpDesk@ed.gov to confirm that the verification request you received is the most up to date.