

Social Security Welcome

Robert Pfaff, Director OES (SSA)

Rob welcomed everyone to the call and shared the following updates regarding the management team.

- New VR Branch Chief
 - Renee Clarke is the new VR Branch Chief for the VR team. She has a PhD in social psychology and has been a Social Insurance Specialist in the Office of Research, Demonstration and Employment Support (ORDES) Office of Employment Support (OES) since 2014. Renee previously served as the Contracting Officer's Representative (COR) for the Ticket Program Manager (TPM) contract and has conducted a wide array of quality assurance initiatives for Employment Networks as well. She brings outstanding written and oral communication skills into the position. Katie Striebinger, who has served previously as the VR team manager, is transitioning into a senior advisor, technical advisor role, where she will largely handle very technical projects, including payments and budget-related items.
- New Manager of Contracts and Grants
 - Melanie Webb, previously served as the COR for the TPM contract and is transitioning into the Manager of Contracts and Grants. She will manage the WIPA, PABSS and TPM contracts. Cara Caplan has transitioned into the Deputy Director in ORDES. She will serve with Joy Cobb and will help provide expertise and guidance on research projects that are related to the Ticket to Work Program.

Welcome

Renee Clarke, Vocational Rehabilitation Branch Chief (SSA)

Renee provided her background of working with ENs for several years. She is getting up to speed on the VR Cost Reimbursement Program policies and procedures and is looking forward to continuing to learn and contributing to the VR team.

VR Updates and Reminders

Keitra Hill, VR Payments Manager (TPM)

Keitra provided the following updates and reminders:

Virtual Training Opportunity

- SSA will be offering a virtual training opportunity for new VR Coordinators.

- VR Coordinators will learn about the Overview of VR policy, best practices for submitting a claim, how SSA processes a claim, and important reminders.
- SSA will hold small training classes (10 individuals or less).
- Send your request for training to VR.Helpdesk@ssa.gov and we will add you to the invitation list.

VR Payments Stats

Fiscal Year (FY)	Receipts	Payments	Claims Processed
FY21	21,313	\$194,363,540	24,522
FY22	27,055	\$237,103,761	29,726
FYTD	24,440	\$182,389,534	25,312

Reconsideration Policy Reminder

- SSA announced on February 2, 2023, that VR agencies are only allowed to submit one reconsideration for the same VR Period if the initial claim was denied due to earnings.
- This means if your claim was denied with the codes below, you should NOT submit another reconsideration:
 - 200
 - 210
 - 220/225
 - 320/325
 - 620
- Unless you have been given specific direction by SSA, VR agencies should submit all reconsiderations via the Ticket Portal, not via email to the VR Helpdesk.

Reminders

- Vocational Rehabilitation Client Earnings Report (VRCER) file goes out once per quarter.
 - The next file will go out the first week of August.
- Send general inquiries to VR.Helpdesk@ssa.gov
 - Include your PID (Provider ID) in the subject or body of the email.

Ticket Portal – “Payments Already Made to Me”

- It has come to our attention that some Portal users uncheck the “Include Denials” box on the “Payments Already Made to Me” screen.
- This is currently not working properly, and users are asked to keep the box checked until SSA can fix the issue.
- You can use the filter options in Excel to remove denials from your downloaded report. If you need help with filtering, please contact the VR Helpdesk.

FY23 Cost Formula Update and PID Reminder

Raquel Donaldson, Vocational Rehabilitation Team Senior Program Analyst (SSA)

PID Reminder

Raquel reminded the VR agencies that when sending emails to the VR Helpdesk, to include your PID and all pertinent information you have (i.e., SSN, beneficiary’s name, date of birth, etc.) to help the team quickly identify your VR agency and respond to your inquiry.

FY23 Cost Formula

Raquel provided an update on the Fiscal Year 23 cost formula. Social Security has almost reached the finish line, and they must get final approval from management, and work out a few kinks. Once everything is complete, Social Security will schedule a question-and-answer session for VR agencies to ensure everyone understands the FY23 Cost Formula instructions. We suggest that once you receive the invite for that session, you should include anyone on your accounting staff and anyone that usually assists with the data for the cost formula.

VR agencies do not need to hold on to claims that require the FY23 cost formula and should submit them just like any other claim. The claims technicians reviewing the claims will place the ones requiring the FY23 cost formula into diary until they can be processed.

Questions & Answer (SSA)

Question: When we download the dairy case report into an Excel spreadsheet, some of the diary information is not transferring from the actual diary language onto the Excel spreadsheet. For example, full PVR or a justification requested shows up on the diary report in the Portal, but it's not showing up on the spreadsheet. Is SSA working to correct this?

Answer: If you have seen any changes to the way the report appears once downloaded from the Portal and placed in Excel, please send an inquiry to VR.Helpdesk@ssa.gov.

Question: Can you explain how to work through the process where we receive an initial denial due to earnings to low? It appears that the clients are being approved to use their blind work expenses. How do we know when we should resubmit? If I see earnings increasing, wouldn't I

want to try to submit the claim again? But then I have no way of knowing if work expenses are being deducted.

Answer: Social Security will go by either the W2 or the earnings that are submitted to us verified. Keep in mind that once you receive the initial denial, anytime that you submit your reconsideration, it's never going to be denied as untimely because we're looking at the date that you initially submitted the claim.

Question: Our VR has recently been moved under our Workforce Development. The workforce function as an EN and VR does cost reimbursement. How will this affect the VR?

Answer: If the VR and Workforce have two separate Unique Entity IDs (UEI), there will be no effect on payments being distributed to the VR under cost reimbursement and to the Workforce under EN payments.

Question: Is there any chance that the determination letters can be accessed in the Portal?

Answer: If you're referring to the letters you get for with the payment amounts, we cannot have those added to the Portal. Those come from a separate entity.

Question: Can the diary due dates for justification or PVR be added to the Excel spreadsheet download?

Answer: Social Security will document this request as a wish list item for future Portal releases.

Question: When trying to retrieve an assignment file in the Portal under check status of files sent to SSA and download results if available, the download column blinks for two seconds and disappears. Any solutions to retrieve the report?

Answer: On the left-hand side of each line on the screen there will be a blue circle with a plus sign. Click that plus sign, which will expand the screen and there you will see the option to download the report.

Question: Is there an alternative method of sending the reimbursement form and wages? Sometimes my faxes are not being transmitted.

Answer: There is no alternative. All Social Security staff work remotely; therefore, we are not in the office to retrieve faxes from a physical fax machine. Reimbursement forms and wages documentation must be uploaded into the Portal using the fax cover sheet generated in the Portal. If you are having issues faxing documents electronically, check with your IT department for assistance.

Question: When you submit a cost reimbursement claim without wages in the comment section and you are faxing them, how long do you have to fax them after submission?

Answer: When submitting your claim, you must enter a comment that states earnings to follow. You will have 24 hours to submit the earnings documentation.

Question: I recently learned that a new blank cover sheet must be printed for every single fax,

or they won't go through?

Answer: That is correct. Once the fax is received by Social Security, the barcode on the cover sheet is invalid. The barcode is for one time use until the Portal confirms that we have received it. Once the Portal shows received, you must retrieve a new cover page to fax additional documents for the Work Case.

Next Quarterly All VR Call

The next All VR Call will be Tuesday, October 10, 2023, at 1 p.m. ET.

All documentation from the All VR Call: Transcript, PowerPoint Presentation, Recap and Audio will be posted to the [Your Ticket to Work](#) website in the next few weeks and can be found on the [Events Archives](#) section of the website.