

TPM Welcome and Logistics

Keitra Hill, VR Payments Manager (TPM)

Keitra welcomed everyone to the call, provided logistics and turned the call over to Margery McIver and Terri Uttermohlen to provide the details about the upcoming Community Partner Work Incentives Counselor (CPWIC) training.

Community Partner Work Incentives Counselor (CPWIC) Training

Margery McIver and Terri Uttermohlen (SSA)

Margery and Terri provided the following updates.

Work Incentives Planning and Assistance (WIPA)

- Ticket to Work Help Line WIPA referral criteria changed effective December 13, 2023
- Ticket to Work Help Line will only refer:
 - Beneficiaries who are working or have an active job offer.
 - Youth between the ages of 14 and 18
- This will not affect any relationships you have established for direct referrals to WIPA awardees.

VR Vendor Training

Virginia Commonwealth University (VCU) Community Work Incentive Coordinator (CWIC) and Community Partner Initial Training and Certification:

- Has limited training resources - designed specifically for WIPA awardees.
- Is available to Community Partners from VR agencies and Employment Networks.
- Includes vendors who support State VR agencies with benefits counseling programs.
- SSA must ensure VR agencies will sponsor potential vendors.
- Must anticipate successful trainee will provide Work Incentives counseling no fewer than 16 hours per week.

VR Sponsorship Process

VR Agencies must:

- Sponsor vendors through the suitability process.
- Send the favorable suitability letter to WIPA@SSA.GOV.
- Send letter of support to WIPA@SSA.GOV.

- Will not accept requests to attend training without sponsorship.
- Questions: Contact WIPA@SSA.GOV

Question & Answer Session (SSA)

Question: The VR is working with the Community agency staff (non-VR Staff) to obtain the information needed for suitability. Is there another way for the agency staff to obtain suitability outside of the VR contract?

Answer: No, the suitability application for the Community agency staff must be submitted through the VR contract. The individual's suitability clearance is tied to the VR's agreement number/UEI.

Question: After the suitability process is done and I'm sending the clearance letter to WIPA@ssa.gov, does that have to come from our director (signatory authority)?

Answer: No, the clearance letter does not have to come from the signatory authority; it can be submitted by any contact listed on your agency's VR profile/record. You can email WIPA@ssa.gov to designate another staff member that is not listed in your record.

Additional questions regarding the CPWIC training can be sent to WIPA@ssa.gov.

Overlapping Claims and Reconsiderations (60-day policy)

Shada Roper (SSA)

Shada provided the following updates on overlapping claims and reconsideration claims.

Overlapping Claims

These are claims where more than one State Vocational Rehabilitation Agency (SVRA) is involved in the process of the rehabilitation of a client. There are cases where services cannot be provided by the client's SVRA, and they must go to a neighboring state for additional assistance. This means there are two states involved in providing services to the same client. Both states are due cost reimbursement, however, the reimbursement cannot be paid for the same services. Both states should not provide the same services, but they must be for the same VR period.

There are pre-payment and post-employment costs. When one state has received a cost reimbursement payment and the client received services from another state during the same VR period, SSA will initiate a post-validation review. Social Security must request receipts from both SVRAs and audit those receipts to determine which state incurred each cost, and whether the state that received the cost reimbursement must repay funds that were not due to them.

Reconsideration Policy

If a SVRA believes they were unfairly denied payment for a claim or disagrees with a partial payment, they have 60 days from the notice of denial or the partial payment to request a reconsideration. Social Security will provide further, more detailed guidance shortly.

FY24 Cost Formula, Denial inquiries, Diary Due Dates, State VR Directory and VR Helpdesk Phone Line

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

Raquel provided the following updates.

FY24 Cost Formula

Over the next few weeks Raquel will be reviewing the updates to the Cost Formula worksheet and submitting the information to Social Security management for approval. Once that approval is received, Social Security will provide the FY24 Cost Formula to all SVRAs.

Denial Inquiries

The VR Helpdesk has received multiple questions about denial inquiries and whether they all turn out to be reconsideration claims. All denial inquiries do not constitute a reconsideration claim. When a SVRA submits an inquiry, the helpdesk analyst will review it and if they find the claim was denied correctly, the agency can submit a reconsideration claim within 60 days of the denial notice. If the helpdesk analyst finds that the claims was denied incorrectly, Social Security will generate a reconsideration claim and process it immediately.

Diary Due Dates

From time to time, a diary due date will change, but it doesn't happen often. More recently, this occurred with the FY23 Cost Formula claims that were in diary awaiting approval of the state's cost formula. Diary due dates can also change when the 30-day diary expires, and the claim technician re-diarizes the case awaiting SSA review or additional documentation from the SVRA. Additionally, if a SVRA requests that a claim diary be extended for good cause, Social Security can re-diarize the case, which will change the diary due date. If you find that a diary due date has changed and it was not for any of these reasons, contact VR.Helpdesk@ssa.gov for clarification.

State VR Directory

The week of January 1, Social Security sent a request to all SVRAs to submit updates to their agency profile of contacts, offices, services offered, etc. Social Security is not able to track when SVRAs have new employees, someone retires or resigns. When someone leaves the state agency, Social Security must be made aware so they we can remove their access to the Portal as applicable.

VR Helpdesk Phone Line

Soon there will be a phone line for SVRAs to call and ask questions in real-time. More information on the phone line will be provided soon. In the interim, SVRAs should continue to send questions via email to VR.Helpdesk@ssa.gov.

VR CER and Portal Inquiries

Katie Striebinger (SSA)

Katie provided the following updates on VR CER remarks and Portal inquiries.

VR CER

On April 14, 2020, Social Security announced the release of the Vocational Rehabilitation Client Earning Report (VR CER) to all SVRAs. VR CER is distributed four times a year, in February, May, August, and November. The report includes quarterly earnings information, represented by letter code, for clients served by a SVRA since 2015. The client must have at least one quarter of earnings out of the last eight quarters on record to appear on the report. On April 16, 2020, Social Security sent a follow-up notice with additional guidance stating that after receiving an initial VR CER file SVRAs have the option to make changes to their file criteria.

The current criterion for the file which is any client served since 2015 with at least one quarter of earnings out of the last eight quarters on record may not be useful to every agency. Agencies may request changes that would reduce the file size, such as selecting different start date, as long as it occurs after January 1, 2015, or limiting the report to beneficiaries who have at least Trial Work Level or Substantial Gainful Activity earnings. VR agencies interested in receiving a modified file this February should reach out to the VR.Helpdesk@ssa.gov no later than January 31.

Portal Inquiries

The Social Security Administration makes protecting its information systems a top priority. The Ticket Portal uses the highest level of security available to the agency and allows service providers to do business safely and securely with the SSA Portal. Access must be limited to individuals who have a business need and plan to access the application regularly.

SSA verifies the employment of every portal user, but sometimes the database is not updated prior to two weeks before the required employment verification date. As a result, some portal users may see a message stating that their employment verification is close to expiring. Portal users do not need to take any action because SSA is proactively performing the employment verification.

Question & Answer Session (SSA)

Question: Does submitting a reconsideration case after a denial error is confirmed use the one-time reconsideration submission?

Answer: If the initial claim was denied in error using the wrong denial code, the correct denial code will be provided via email and the one-time reconsideration submission can be used. If the initial claim is denied in error, and the VR Helpdesk analyst concludes that the initial claim should have been paid, a reconsideration will immediately be created and processed by SSA.

Question: Would it be possible to get a beneficiary's statutory blind status posted on his or her portal page?

Answer: No, Social Security cannot add that information to the portal. However, you can contact VR.Helpdesk@ssa.gov with any questions regarding the statutory blind status.

Question: On the VRCER file, what does the statement "Client served since MM/DD/YYYY" mean? It seems to be saying the clients Ticket was placed in-use after that date. However, VR agencies are finding they placed the Ticket in-use before that date and continued to provide serves after 2015. These clients don't often show any VRCER wages.

Answer: The current VRCER files are based on Tickets assigned after January 1, 2015. You might have been serving them in 2015, but those clients took part in the previous iteration of VRCER file, so they were not included. Social Security went back to the date when they stopped providing the earnings that were in the previous quarterly information.

Question: If I know I submitted a claim correctly, but it was denied 590. I sent an inquiry to the VR Helpdesk and was advised to submit a reconsideration claim. Then it was denied for a 220 or 320. Can I submit a new reconsideration claim?

Answer: Yes, if the claim denied 590 is in error, after you sent the correct required information and Social Security finds that the technician processed the original claim incorrectly, you can submit a new reconsideration claim for a 220 or 320 denial.

Question: Are there any negative consequences if a VR vendor was not able to provide the 16 hours of Work Incentive counseling?

Answer: 16 hours of Work Incentive counseling is the anticipated number of hours that CPWICs will be providing counseling to beneficiaries per week. Social Security wants to ensure that the CPWICs are using the information on a regular basis so that they are staying up to date with the information they are sharing with beneficiaries.

Question: The 60 days for submitting a reconsideration claim -- does that apply to cases that are denied for not having nine months of SGA? A SVRA go beyond the 60 days when the beneficiary working to obtain the 9 months of SGA needed to submit a reconsideration claim.

Answer: Social Security will provide further, more detailed guidance shortly. Additionally, SVRAs still have the option to submit a reconsideration claim later with “good cause” for why you were not able to submit the reconsideration within 60 days for Social Security’s consideration.

Next Quarterly All VR Call

The next All VR Call will be Tuesday, April 16, 2024, from 1-2 p.m.