

Keitra Hill (Moderator): Good afternoon, everyone. Thank you for joining January's All VR Call. I am Keitra Hill, the TPM VR Payments Manager, and I will be facilitating and moderating today's call. Before we begin with the presentation, I want to go over the agenda as well as some specific items with logistics. So again, thank you, everyone, for joining this call, our first call of 2024. Happy New Year, all.

Okay, let's move right on into the logistics. The first thing to mention is that during the Q&A session, if you're joining via phone and you wish to ask a question, please raise your hand by utilizing star 5 and you will be unmuted by the facilitator, and then press star 6 to unmute yourself. If you are joining via Teams app, click on the Raise Hands icon and you will be unmuted by the facilitator, and that would allow you to unmute yourself and ask your question live. Please ask one question each time you are called upon by the facilitator. Any additional questions or comments that are not responded to during the Q&A session can be sent to the vr.helpdesk@ssa.gov. Those questions that are not answered during the live session will be forwarded to the appropriate panelists to respond to your comments or questions.

Next, for closed captioning — it is available for participants who are joining via the MS Teams application or if you're utilizing a separate closed caption link provided, that is in the chat currently. So, to turn on the closed caption options in Teams, go to More at the top of the Teams screen. Then click on Language and Speech, and then select Turn on Live Captions. If you're using the link option, again, the link is provided in the chat. Copy and paste that link into your browser, and that will open a separate window for captioning.

The last thing to note is that the presentation, recap, audio as well as transcript from today's call will be available in about two weeks after this call on the Your Ticket to Work website under the Events, Archives and National Calls. So, thank you in advance for your participation in today's call.

Next, I will be turning the call over to Terri Uttermohlen. Please go ahead and continue with the updates on the CPWIC training. Thank you.

Terri Uttermohlen (SSA): Thank you, and good afternoon, everybody. My name is Terri Uttermohlen, and I'm the Technical Advisor for the Work Incentives Planning and Assistance Team. Most of you probably know that with the Ticket to Work and Work Incentives and Improvement Act, Congress funded a program that Social Security provides work incentives counseling to beneficiaries across the country under the Work Incentives Planning and Assistance, or WIPA, program. And my colleague Margery McIver and I have a couple of updates about the program and how it intersects with VR agencies. So, the first one is that under the Ticket to Work legislation, we have not received funding since 1999, additional funding. We have a set amount, and the reality of that is that as time goes on, the capacity is decreased. And where the projects were kind of drowning recently with the number of referrals that they were receiving, we wanted to target the referrals to the people who need the counseling most. From our perspective, these are people who are already working or people who have a job offer pending, or youth who cannot be served with general information by the Ticket to Work and Work Incentives — I'm sorry, by the Ticket to Work Call Center that is operated under our contract with Cognosante, I apologize, with the Ticket Program Manager. The youth don't have a Ticket yet, if they're under age 18, or they've not had an adult determination of disability. So, we have to,

again, target the services to the people who most need it, and the way we're doing that is by restricting who the Ticket to Work Help Line will refer. And those are, again, people who are working, whether they're working full time or part time; people who have an active job offer, so they're trying to decide whether or not they should take a job, and youth who are under 18 or have not had an adult determination.

So how are we going to serve those other people; the people who, in the past, have been referred to the Work Incentives Planning and Assistance Program? We have enhanced the scripts that the Help Line uses to provide general information about Work Incentives that's a little more enhanced to what they've had in the past, especially things about the Student Earned Income Exclusion, which is a Social Security Work Incentive for youth who are under 22 and still in school, but we also updated the scripts that they use for all the other Work Incentives. Again, the goal is to provide an interim level of service for people who aren't working. That's kind of the idea. The important thing is, it doesn't affect any relationships that state VR agencies have with WIPA programs, but we want you to be aware of it because if you send somebody early in the process to the Ticket to Work Help Line for a referral, they're not going to be referred to WIPA unless they have a job offer or they are working or they're youth. We have to restrict it. So, if you have people who aren't being served and you want to work with your local WIPA agency, this doesn't affect that. It doesn't affect who they can serve, it's just who the Help Line will refer.

So, the next slide is on a different issue, but it's kind of the same cause. Because we have limited funding, we have to focus our training dollars on people who are providing services. So, in the past, we had all comers. Anybody who said that they were going to provide benefits counseling, no matter who they worked for, could have training, but we just don't have the capacity to do that anymore. So, if you have VR staff who want to provide benefits counseling, that's fine. They can register as long as they're going to provide benefits counseling for a good chunk of their workday or their work week, at least 16 hours, so 40% of a full-time schedule. And we do that because it's a very perishable skill. It's a use it or lose it skill, and if you don't use it, you're going to give misinformation to beneficiaries, and we don't want that to happen. We'd rather have people still have the question than to get an incorrect answer. Several of the states, though, have vendor programs where you pay to get benefits counseling from a WIPA service, but not on their WIPA time. So, a lot of the programs have people who are paid partially under WIPA, but also part of their salary comes from these VR arrangements, either with WIPA programs or with other community agencies. And we've had several VRs who have these arrangements say, hey, we need training for these people. And we've had a lot of people who have contacted us on speculation. They're like, oh, I kind of want to be a benefits counselor. Can I go to the training? That's not going to get it. We really need to have a relationship with that individual or with the organization that they work with. And by having a relationship, I mean the state VR agency has to sponsor the person who's going to go through training.

Just looking at my slides, my notes real quick. So, Margery's going to talk about how you can sponsor people. I'm going to pass this over to her in just a second. But just remember that the people that we want are the people who are going to serve our beneficiaries well and people that you know. People as VR agencies, you go, hey, you know what? I know this agency. They hire people. And I want to send this person to training because I think that they'll do a good job. It's in your hands to sponsor them and let us know that this is something that you want. Margery, I'm going to pass it over to you.

Margery McIver (SSA): Thank you, Terri. Hi, everybody. So again, thanks, Terri, for the background. And I want to take just a few minutes to describe the process for sponsoring an individual to attend the Virginia Commonwealth University Initial Community Partner Training and the subsequent certification process that follows after the training. And since that's a mouthful for this portion, I'm just going to refer to that as VCU Initial Training as I go through this process. So, although class space is in high demand with our VCU training, we do, like Terri said, we recognize that in many states, the third-party vendors that you work with provide benefits counseling and perform a valuable service in your state. And we really want to support that. And we want to continue that relationship. So, for those states with VR vendor programs, we do offer a provision to get the individuals that you identify as vendors eligible to attend the VCU Initial Training and certification to go through the certification process.

So, we started this process, I think it was probably a little over a year ago. And several state VR agencies have been using it. And it seems to be working. But we just really thought this would be a good time to reconnect with you and remind you of the process for those who might want to take advantage of it. And we know not all states have VR vendor programs. So, I'm going to briefly describe the process for the VR sponsorship. And we've also provided a document outlining the steps as part of the resources for this call. If you can't access that easily at the end of this, I'm going to give you an email address that you can reach out to get any information you need, including what the specific steps and protocol is for sponsorship.

So initially, VR agencies, as Terri said, you need to identify the individuals who will need training and certification to provide the services in your state. And as Terri said, we know that many of you already have relationships with community agencies. You already have a pool that you pull from for this purpose. And it's often a situation where the community agencies are reaching out to you as they bring staff on board and letting you know who they want to go through this process. So, whatever the process is in your state to identify prospective vendors, these are the steps that you will follow for VR sponsorship with Social Security. So, all registrants for the training must be determined suitable by Social Security. And this not only applies to VR applicants, but all our partners, for example, Employment Network staff. This is really the first step in the VR sponsorship. So, VR agencies who wish to sponsor individuals must request suitability from SSA. And just to be clear, when we refer to suitability, we're talking about undergoing a background investigation. Once you identify your person, your vendor staff, you will apply for suitability following your normal suitability process that you would follow as if you were requesting suitability for your own VR staff. So, the individuals you are sponsoring cannot apply for suitability on their own. The VR agency must correspond with Social Security directly to complete this process. The paperwork will be submitted under your agency name and your agreement number. Vendors cannot contact us directly to indicate they wish to be a vendor in your state and submit paperwork on their own. This all needs to flow through you and through your agency information.

Once the VR agency receives the favorable suitability letter for the vendor, then they must send it to us along with a brief statement indicating their willingness to sponsor the individual. And you'll send this statement along with the suitability letter to WIPA@SSA.gov. That is WIPA@SSA.gov. This is also the email you'll contact if you have any questions or need any kind of additional information about this process. So, for their part, the individual must create a training account on the VCU website and complete the Introduction to Social Security Disability Benefits, Work Incentives, and Employment Support Programs web course, which we affectionately refer to as the introductory web

course. So again, these are steps that we require of all our community partners, not just VR vendors. Anybody who is going to try to get into the VCU initial training, whether they're from an Employment Network or from one of our other partners, they also must create this website, sorry, create their training account on the VCU website. It's called a MyNTC account, and they must take the introductory web course prior to going into the VCU initial training. I know this is all a mouthful, so we've outlined this process on a document labeled VR Training Requirements, which is part of the materials for this call. But, again, if you can't access it or if you need more information, please reach out to us at WIPA@SSA.gov , WIPA@SSA.gov . We're happy to answer any questions on this call as well. And as an additional note, I do want to just add that the steps we're describing for the VR sponsorship will lead to a person becoming eligible to register and attend the training. The training classes are in high demand. So, the individual you sponsor, you may go through all the steps, and they may sign up for a class, and they may not get into the first class they register for based just on availability and class slots. We will do our best to get them in as soon as possible. We recognize that you need these folks. They're part of your state system of providing benefits counseling. So that is all I have. And, Keitra, I don't know if this is a time that we can open it up to questions.

Keitra Hill: Yes, this is absolutely the time to open up for questions.

Terry Uttermohlen: Great. And this is Terri. I'd like to add one thing that came to me. By sponsorship, we don't mean pay. The training is free. And if you have people who are interested, they can take the introductory web course that Margery mentioned at no cost. They just have to register on the VCU website and go into MyNTC, create a MyNTC account, and they can take the class for free. And it just provides an overview of the work incentives and the Work Incentives Planning and Assistance program. But I just realized, Margery, when you were talking, that the word sponsorship might be confusing, and I think the agencies may think they need to pay. So, Keitra, go ahead and open it up for questions.

Magery McIver: Yes, thank you, Terri. That's a great point. And also, we do provide information about signing up for the MyNTC account on the document I mentioned. But thank you, Terri. That's a great point.

Keitra Hill: Thank you both. Yes, so we want to go ahead and get started with our questions. Emani, do you see any hands raised in the participant list?

Katherine Jett (TPM Q & A Facilitator): Hi, Keitra. I see one hand raised. We have Jennifer. Jennifer, you are unmuted. If you'll go ahead and click the microphone above to unmute yourself and ask your question.

Jennifer (Participant): Thanks. Can you hear me?

Katherine Jett: Yes.

Jennifer: Hi, how are you? Thanks for this. Thanks for this information. So, I feel that a VR working with a community agency staff person to obtain and collect the information needed for suitability, which is very private and sensitive, of course, in nature, it seems to be something that would not be preferred for VR or the community agency staff, really, themselves. I understand that the person shouldn't be contacting SSA or TPM, but is there another way for the agency staff to obtain the suitability outside of

the VR contract? The person doesn't work for VR, so they're an agency staff, and here we would be collecting all this information. They'd have to provide that information, and we don't really have control at that point what's going to happen because they're not a VR staff person.

Terri Uttermohlen: This is Terri. I can take that. The person would actually be providing the information to Social Security via an online system. It wouldn't go through the state VR agency. And the point is that these are limited training resources, but it's also giving somebody an opportunity to access beneficiary information for very vulnerable beneficiaries who could be taken advantage of. So, it's due diligence on our part as an agency to try to make sure that at least they meet the basic suitability requirement, and suitability just means suitability for public funds. It's not a security level like you would get if you were in the military or worked for the CIA or something like that. It is essentially checking criminal records, making sure that every possible form field is filled out. It's all online.

Magery McIver: Oh, Terri.

Terri Uttermohlen: Yeah.

Magery McIver: I was just going to say. I do need to just point out, though, the initial part of the process does need to be initiated by VR, which requires that they complete an eQIP form that they would then send through, and the suitability paperwork, just as we would the normal process that goes through the VR team. So, the VR agency does need to complete that portion, and then once it gets through that first part, and then the suitability office sends a link for the individual to complete the actual questionnaire, that goes to the VR agency, and the VR agency forwards it to the person to complete. So that part, you're right. They can do that on their own, but there is an initial level where VR does need to get involved in the eQIP, and I believe the eQIP does have the person's Social Security number on it. So, there is some sensitive information that we are holding the VR agency responsible for submitting.

Jennifer: Yeah, and I know I have suitability, and I used to put a ton of staff when I was an EN through suitability, so I'm aware of how an EN might do that, as well as how we do it at VR. So, I just was just wondering. I would say one of the reasons we have not moved forward with that, is because of suitability. It's not necessarily the letter and the sponsorship, but that suitability component, and what it entails in terms of us collecting it, and the agency staff person providing it. Just wanted to share my thoughts on that, and ask if there was an alternative, or if you would consider some other alternative, because, I mean, there might be more, people that we can sponsor that way, I guess. I don't know.

Magery McIver: Yeah. Currently, we don't have anything in place to put people through suitability, unless it's through one of our, agencies or organizations that we have a relationship with, that we have, you know; like you have a number you put on the suitability form when you put it through. But I do think there is a little middle ground there, you know, that if the VR agency can commit to sending in the eQIP form with that little bit of information for the person, send it through, and they do need to manage getting it back, and then forwarding it to the individual for completion. But I do think most of the information, most of the sensitive information is shared directly, as Terri said, with the suitability office, between the individual and the suitability office, except for that initial name and Social Security number piece. And then there is the extra burden of having to

manage and make sure since all correspondence would be going through the VR agency. But right now, we don't have another mechanism other than with an organization that we have a relationship with.

Terri Uttermohlen: This is Terri. One of the challenges that to try to establish something like that is, when we grant suitability to someone, we grant suitability to operate on a specific grant or contract. And so, it's not just, hey, you're suitable, you can apply this to anywhere. Even if you have suitability under one grant or contract, and you move to another one, then you have to get it again under that new number. It's an easy process, but it is tied to the grant or contract number.

Katherine Jett: Thank you, Terri. Thank you, Margery. We have one more individual with their hand raised, Eric. Eric, you are unmuted. You may ask your question.

Eric (Participant): Hi, thank you for taking my question. Hopefully, it's a very quick question. The suitability process for Maryland goes through our director, like the Signatory Authority for our agency. My question is, after the suitability process is done, and I'm sending that letter to the WIPA@ssa.gov, does that have to come from our director? I would prefer it to come from my office because I'm responsible for actually seeing the vendors through. Is it okay for me to send that versus our director?

Margery McIver: Hi, Eric, this is Margery. Yes, that's totally fine. And I know that our wonderful Casey Day, who manages that WIPA box, has already built relationships with certain states, and gets contact from staff people there. And yes, it absolutely does not need to come from the head of your agency or Signatory Authority, for sure.

Eric: Okay, I appreciate it. Thank you.

Terri Uttermohlen: In fact, I think that would be based on the individual agency's preference. Correct, Margery?

Margery McIver: Yeah. I think that's fine with us. And I think it's really great if there is one person like you, Eric, in Maryland, to reach out if you guys do have any. States do have relationships and have the vendor programs reach out to the WIPA box and let us know. And that way, we know who to expect things from and what's going on. That's always helpful.

Katherine Jett: All right. Thank you, Margery. Thank you, Eric. And thank you, Terri, and Margery. And Keitra, we have no more raised hands at this time.

Keitra Hill: Awesome. Thank you again, Terri and Margery. Now we will move into overlapping claims and reconsiderations, which Shada Roper will be giving us an update on that. Shada, please go ahead.

Shada Roper (SSA): Good afternoon, everyone. So as of lately, it seems we've had some inquiries on overlapping claims and our reconsideration policies. Overlapping claims, for those of you who do not know and are not in the habit of having these types of claims, these are claims where more than one state voc rehab is involved in the process of the rehabilitation. Therefore, if the service cannot be provided in D.C. and the claimant is from D.C. and they have to seep over to Maryland to get additional

assistance, they can have two states involved. What happens; however, we do pay both states. However, we do not pay for similar costs. The costs have to be completely different costs because the point of that is that one state cannot provide the service that the other entity is providing. That's why it becomes overlapping because there are two people involved and the claimant is in need of those services and one state is not able to provide it. So, we will provide the payment for both states, but just not for the same cost. In these cases, in the past, they've been mostly cases of post — we have prepayment, so it's post-payment, where we find out later that one state has been paid, but later on, a person had services from another state during the same time period. So, it also has to be within the same VR period. So, both states are involved. Once we see that that has occurred, then review it. We treat this as what we call a post-validation review. And if we have to recoup any monies from the states, we will recoup the monies and treat this as a validation review because we have to do our audit. Receipts have to be sent in for this so that we know what states incurred what costs. So, it's one of those type, validation reviews that happen.

If by chance, at the same time, two states are working with that person together during that same VR period, then it has to be between those states that, yes, we know that that state can provide that service and we cannot. Therefore, we're providing the other services, and this does happen. Does it happen on a regular basis? No, but we do know that it will happen. And then both states are able to submit costs for that VR period and that claimant.

As for our reconsideration policies, the Social Security policy is you do have 60 days to file a reconsideration. If for whatever reason you are unable to file a reconsideration within 60 days of our notice, because it's on all our notices once we process a claim, if you are under the notion that you were denied unfairly or you had a partial payment that you disagreed with, therefore you have 60 days. If for whatever reason it goes to the 70th day, we have to have what we call good costs. And we have provided policy and will provide more policy on what to do in case you've exceeded this 60-day time period. But it is Social Security law, disability law, and part of our regulations that you have 60 days to file for reconsideration of any initial action that we do. And Keitra, I will pass it back to you.

Keitra Hill: Thank you, Shada. Now we will hear from Raquel Donaldson with updates on the Fiscal Year 24 Cost Formula, denial inquiries, diary due dates, state VR directory, and then lastly, the VR help desk phone line. Raquel, go ahead. Raquel, you're on mute.

Raquel Donaldson (SSA): Thank you so much. I was saying good afternoon, happy new year, just a few things to go over. Fiscal Year 24 Cost Formula. I know the ears have perked up. I will be sending that information out probably within the next couple of weeks. As soon as I'm able to review all the information that we have on the updated worksheet and get approval for management, then it's coming your way. I do appreciate the fact that everyone pretty much got the Fiscal Year 23 Cost Formula in a very quick manner. So, thank you for that. Thank you so much to Eric Schmidt and Erica Loomis on your side, the VR side, because without them, there was tons of questions that the VR sent my way, and I reached out to them. So, thank you so much. And to anyone else that also assisted with getting this cost formula straightened out for any VR, thank you, thank you.

Denial inquiries. There's been a question raised in regard to denial inquiries that come into the VR help desk. Do they always turn into a reconsideration? The answer to that is no. If you send in a denial inquiry, we review it, the help desk analyst reviews it, and if it's discovered that it was denied correctly, then yes, you do have your one reconsideration that we suggest you submit. As Shada just

mentioned, it has to be done within a 60-day period. If we find that once we review the denial and it has been denied incorrectly, so it's an SSA error. Then yes, that is something that I create immediately and have the reconsideration done, created, and processed on the spot. You should not have to wait for it to be we usually process first in, first out. You shouldn't have to wait for that when it's not your fault that the claim was denied incorrectly. So those are the times that a reconsideration is done immediately by SSA when we realize that it is our error. There are times when I try to create the reconsideration and for whatever reason I'm not able to. I will reach out to the VR and ask you to do it for me. But even when you do that, I ask you to send me the SSA reference number immediately. So again, it can be processed on the spot. So that's the information in regard to denial inquiries.

Also, there was questions in regard to diary due dates, and sometimes you may see the diary due date change. This should not be something that happens often. I will say in the months of November and December when we had all of those claims that we were waiting for your Fiscal Year 23 Cost Formula to be approved, yes, the diary date did change often. It gets changed every time the 30 days expired, we had the technicians and analysts go in and update that diary due date. And that is the only reason you will see something like that happen on a regular basis. That's not the norm. Every now and then, the diary due date may change if you reach out to us and have a good reason, good cause for us to push the diary date out, extend it. Again, that's a reason we will change the diary due date. Other than that, your diary due date, you should not see it changing constantly. If you do find that and it's not in regard to the cost formula or something you've requested, please reach out to the VR help desk and we'll look into it.

State VR Directory. I did last week send out requests to all of VRs to send me any updates, corrections that you may have. Please keep in mind that we're not able to track when you may have a new employee or someone retire and leave, so we need to know that information so we can remove their access to the portal if it's someone that's leaving your agency. Again, this directory is a great resource for everyone to use. I always suggest when one VR has a question, that you use it and reach out to another SSA coordinator at a different VR, build that communication, build those relationships.

Finally, the VR help desk phone line. This is just a little quick teaser for you that's coming soon. That's all I got. It's coming soon, the help desk phone line. Any other questions, please email me or just email the VR help desk. Don't email me directly, email the VR help desk. I'm trying to get away from that unless you really need to deal with me directly. And I will give it back to Keitra. Thank you so much.

Keitra Hill: Thank you, Raquel. Next, I'll turn it over to Katie Striebinger to go over VRCER and portal updates.

Katie Striebinger (SSA): Hello, everyone.

Keitra Hill: There you go. All right, Katie. Sorry.

Katie Striebinger: No worries. Sorry, I got stuck in the rain. It is wet out there. Good afternoon, everyone. I just have two things I wanted to mention because they come up. We do, you know, ask for all call topics right before the call. So, I just want to address two things that I got an inquiry about. I am going to be available for Q&A later on the call if anybody has more specific questions. The first thing is I got a question about VRCER. For those of you not as familiar, on April 14, 2020, SSA announced the release of the Vocational Rehabilitation Client Earning Report, we call that VRCER, to all state VR agencies. The VRCER report is distributed four times a year, in February, May, August, and November. It

includes quarterly earnings information, which is based on a letter code for clients served by your agency since 2015 who have at least one quarter of earnings out of the last eight quarters on record. Two days later, on April 16, SSA followed up with additional guidance stating that after receiving an initial VRCER file, state VR agencies have the option to make changes to their file criteria. The current criteria for the file, clients 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 another 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 Help Desk no later than January 31. Right now, the only changes that will be allowed must comply with the original guidance that I just read.

The second item was an inquiry I got about the portal. 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 safely and securely do business with SSA. Portal access should 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 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 already performing this employment verification, but if you want to, you may reach out to the VR Help Desk, letting us know that you got that alert, but it is not necessary for you to reach out. We will make sure that you do not lose your access. Those are just the two items I had. I will be on for Q&A in case there are questions later. Thank you.

Keitra Hill: Thank you, Katie. So now we are at our Q&A session. I did see a few questions in the chat. I believe, Margery, you may have responded to those in reference to the CPWIC training. Let's see. Just scrolling back through. Katherine, can you help me out with those questions in the chat? I have like two windows open, trying to keep track.

Katherine Jett: Yes. All right, Emani, do you have any questions in the chat?

Emani Cain (TPM Q & A Chat Facilitator): Yes, we have a few questions. I'm not sure if these were already answered. This is a little from earlier. We have one from David. Well, I'll just go to the questions that were recent. Okay, I'll start at David. If we put someone through and they don't spend 16 hours providing services, are we punished in any way? It's a two-part question.

Keitra Hill: Margery and Terri, I believe that question is for you in reference to the CPWIC training.

Raquel Donaldson: I believe both Margery and Terri have dropped off the call since we had their Q&A earlier. So, if there are any other questions for Margery and Terri, we will send them over to them directly.

Keitra Hill: Okay, great. Thank you, Raquel.

Raquel Donaldson: You're welcome.

Keitra Hill: Emani, go ahead.

Emani Cain: So, we do have one recent one from Ashley. Does that then use our one-time reconsideration for that claim if it was an error, disallowance, and then turns into a denial, such as initial 590, then recon is a 320?

Katherine Jett: Shada.

Shada Roper: So yes. If you were initially reconsidered and it was a denial and then you have another denial, a reconsideration affirms the initial decision, even if it's a negative action. So, it's an affirmation of another negative action. And yes, that is your reconsideration.

Katherine Jett: Thank you, Shada. Emani, do we have any more questions in the chat?

Emani Cain: Yes, we have one more from Colleen. Would it be possible to get a beneficiary statutory blind status posted on his or her portal page? For some reason, the information that we receive or don't receive is either missing or not always accurate, which results in frequent denials based upon not having correct statutory blind status information.

Katie Striebinger: Hi, this is Katie. No, we cannot add that information to the portal.

Katherine Jett: All right. Thank you, Katie.

Raquel Donaldson: So, I'm sorry. This is Raquel. So, Colleen or anyone else that has that issue where you're questioning stat blind or non, you can email the VR Help Desk in regard to that. And also, anyone that did have a question for Margery or Terri, and it was unanswered, please feel free to email them at WIPA@SSA.gov.

Katherine Jett: Thank you very much, Raquel. Thank you, Emani. This time, we'll go ahead and take the raised hands. We have Eric. Eric, you are unmuted if you'd like to ask your question.

Eric (Participant): Yes, thanks. This is for Katie, and I'm sorry to put you on the spot, Katie. It's about the VRCER. My question, I guess, is what they mean, you know, whoever designs the file by clients served since a specific date. The issue I think that I'm having is what we're seeing is it basically means their Ticket went into use after that date. The problem is for folks that we've had where the Ticket was in use before that date, but we continued to serve them after 2015. They don't always seem to be showing any VRCER wages. So, I don't want to send a request because obviously, that's outside the criterion you mentioned. But I don't know if it's actually being used correctly even as written. My interpretation of the clients served would be not just those assigned after, but those that had a Ticket assigned after that date, not just that it happened to be assigned after that date. Does that make sense?

Katie Striebinger: Right. So, we're doing it based on the assignment date. It is assigned after January 1, 2015.

Eric: Okay.

Katie Striebinger: You might have been serving them in 2015, but those clients took part in the previous iteration of VRCER, so they were not included. We went back to the date when we stopped providing the information, the previous quarterly information.

Eric: Yeah, old information or whatever. Yeah, yeah. So that's what we did. Okay. There's no way to get that added, then? Because it sounds like you're saying that's out of the criterion to request a change because that would be actually increasing our request, not decreasing it, so I could see why you wouldn't do that. But I'm just making sure that's what you're saying.

Katie Striebinger: Yes, that was the intention, you know, to, if at all possible, and I am only speaking because I've been here since VRCER was launched. You know, our hope when we originally implemented VRCER in 2020 was that VR agencies would take a look at what they were getting, and they would figure out a way we could send a more useful file, because all we're sending right now is anyone with an assignment date after 2015, right? We just get one big dump and send it out. So, you know, we were actually hoping that VR agencies would go look and figure out what was actually useful and a way to reduce the records that we were sending out. So, we're not just sending some, like I said, a quarterly dump of data. At this time, I'm not aware of any VR agency customizing or modifying the files since it was originally sent out. We're trying to get a feel over here for what is useful in the file and what is not, and we have not gotten a lot of feedback. So, I do think maybe another discussion about it or just some feedback; you know, what can we do to make this better to make it more targeted? I think that's something we're definitely willing to have a discussion about, and if you think that going further back would be more useful; but in some other fashion, making some other criteria that would somehow still reduce the size of the file, I think we would be willing to consider that. We just don't want to send more records, which is kind of what you're asking at this point.

Eric: Yeah, we'll take it and maybe we'll have a discussion and we'll come back at you. I appreciate it. Thank you.

Katie Striebinger: Yeah, we want to make this file useful for everyone, and I just thought maybe since we did send the guidance to come back at us with any suggestions, and we haven't heard anything, we were kind of thinking maybe this is a time to remind everyone to take a look. If you would like to make a change and have that conversation, I think it'd be a great place to start. So, thank you for starting the conversation with your question.

Katherine Jett: Thank you, Eric, and thank you, Katie. We have another individual with their hand raised. Ashley, you are unmuted if you'd like to ask your question.

Ashley (Participant): Okay, I'm sorry. I just wanted to circle back to the question I had in the chat. I don't want to be a pest about it or anything, but I guess I should clarify it a little bit more that the actual 590 disallowance basically stating that wages were not provided was on actual VRCER claims. So, I know in order to look at the claim again, a reconsideration had to be done, but when the fact that the claims were put in correctly for VRCER and then a 590 was an error disallowance, and then the recon was submitted and then denied, that used the one recon for an error disallowance.

Raquel Donaldson: Hey, Ashley, this is Raquel. So, I get what you're saying. You're saying that you submitted the claim based off of VRCER and you got a denial of 590, correct?

Ashley: Correct. And it was submitted the right way of having VRCER in the comment box, the way it's supposed to be on the 199 and everything. And then it was — yeah.

Raquel Donaldson: Got it. So, my question to you is once you saw that 590 denial and you knew that it was submitted correctly with the VRCER comment, did you email the VR Help Desk or what happened?

Ashley: I did.

Raquel Donaldson: Okay. I had a big lump of them come in.

Ashley: Okay, this was a while ago. And those were all then submitted. And I think all but one of them ended up being a denial of either 220 or 320. And that's what the question was, would I be, in fact, able to do a reconsideration on the 320s and 220s?

Raquel Donaldson: For that situation, yes.

Ashley: Okay.

Raquel Donaldson: And I'm saying yes because if the 590 was denied incorrectly, meaning, you had the information you were supposed to and the technician that processed it originally did it incorrectly, then bottom line, that 590 is null and void.

Ashley: Okay.

Raquel Donaldson: So, you got denied 590 and then we said, oh, Ashley, sorry, it should have been a 210. Okay, well, then you haven't done a reconsideration yet.

Ashley: Okay.

Raquel Donaldson: You want reconsideration on that 210 once you know you have more earnings or 220, whatever it is; once you know that you have your earnings there.

Ashley: Right. And would I need to then submit documentation when I do reconsiderations on those like 210s, 220s, 320s, whatever it is, showing — I don't want it to come up saying that I've already submitted a reconsideration for this and then it automatically gets denied.

Raquel Donaldson: I always say the more information, the better. So, if you put in the comments exactly what happened to you, you know, of course, like with the 590 and it comes to us and we make that correction, I would put in your notes once you do your reconsider what happened.

Ashley: Okay. Okay.

Raquel Donaldson: Is it always going to work? No, we already know that because everyone's human.

Ashley: Right.

Raquel Donaldson: But as long as you bring it to the help desk's attention, they'll bring it to my attention and then we know how to take it from there.

Ashley: Okay, great. Thank you.

Shada Roper: You're welcome. Ashley, you're going to have to send that actual question to the help desk because there is something more to that whole idea of the policy.

Candice Whaley: And hi, this is Candice. I just wanted to remind you that even though you have VRCER on the claim, we actually have to have those earnings in our records to even be able to work the claim. So that may be an issue as well. We've seen that happen a few times. So, if you do have, like Raquel had said, something that's a certain issue that you're dealing with with one claim, then please send it to the help desk. But right now, all of the initial claims are being processed, and if you don't submit a recon within 60 days of the denial decision date, they will be denied a 620 for untimely filing. That is our policy, and our system has been updated to give us that information so that if you see a lot of 620s and it's on a recon, which is why, because you filed the initial claim over 60 days from your denial decision date. So, they will be denied a 620. If you have a certain question about a particular case, then please contact the VR help desk. Thank you.

Katherine Jett: Thank you, Candice. And thank you, Raquel. Thank you, Ashley. And at this time, I'm going to turn it back over to Keitra.

Keitra Hill: Thank you, Katherine. We have an update from SSA and that will be coming from Melanie Webb. Melanie, go ahead and unmute yourself and provide your update.

Melanie Webb (SSA): Hi. Thanks, Keitra. This is Melanie Webb with SSA. I just wanted to clarify — or not clarify, but just address one of the questions that was asked earlier for either Terri or Margery and I know they both had to drop. But I believe the question was whether or not there were any negative consequences if a vendor was not able to provide the 15 hours of training. And to that point, I just wanted to mention that the 15 to 16 hours that was referenced, that is the goal, because we want to make sure that people are using this information on a regular basis so that people are staying fresh and up to date with information that they're sharing with beneficiaries. So, the 16 hours, that is the anticipated number of hours that you will be providing to beneficiaries per week. So, it's not the actual number of training hours, but those are the, you know, referencing the number of hours that you would be providing to services for beneficiaries each week. So, I'm hoping that that answered the question, but if it didn't, the person who asked the question, if you want to come on the line, I'm happy to provide further information. Thanks, Keitra.

Keitra Hill: Thank you, Mel. And that question came from David. So, if you would like to ask an additional question or seek clarification, if you could go ahead and raise your hand. Katherine, I believe we do have another hand raised for a question.

Katherine Jett: We do. It's Donna. And Donna, you are unmuted if you'd like to ask your question.

Donna (Participant): Hi. I just wanted to follow up about the 60 days for reconsideration. That doesn't apply when you're talking about cases that didn't have the nine months of SGA, does it? Because it may be beyond the 60 days before you actually get nine months of SGA.

Shada Roper: So, you have 60 days from your notice to file a reconsideration. If, for whatever reason you had an adverse action saying you were denied, you filed an SGA claim, and then you were denied a 220 or whatever you were denied; therefore, then you have 60 days to reconsider it. You actually have five days from the time that we send the letter, which would be what our counting of five days is, the notice date. And then that makes it actually 65 days to file a recon. Because usually it doesn't take five days, but we're figuring it takes anywhere from two to five days for you to receive your notice. And then you would have to file that reconsideration within 60 days to say, I'm not sure why I had this 220. And if, for whatever reason, you're on 70 days, then go ahead and submit what we call good cause to our Branch Chief to say, this is why I did not file the reconsideration within the 60 days reconsideration time.

Katherine Jett: Thank you, Shada.

Candice Whaley: Can I ask you a question? Is this Ashley? I'm sorry. Is that who asked the question?

Katherine Jett: That was Donna.

Candice Whaley: Oh, Donna. Yes. Remember, we used to have claims for resubmittal, and we had also recons. So, we have to follow the recon policy right now because that is the only type of claim that we have. Please keep in mind that we are working toward getting the resubmittal back in the system. It's going to take a while, and policy will change with those claims. And that's basically when you didn't have eight or nine months of SGA, and you refile it within like another quarter or so. And those are resubmittal claims. Now, remember, that was a lot easier to submit because that was just, it wasn't like an appeal on the decision. It's just you were waiting for more earnings. So right now, this is the only thing that we can do with the recon because that is our policy, and that's what it says in law. So, we have to follow that policy. Katie does have it on the list to try to get systems to do the resubmittal claims, and that will be a whole new ballgame, and that will be just like it was in the past. For those of you who have been here, you could submit the resubmittals more than once. So, I just want you to try to be patient with us. We hadn't followed that law for the 60-day recon because we didn't have any systems issues involved with that. So, we did get the system updated for us to be able to see that decision denial date, and that's why you are getting more 620s than you were before because when you filed the recon, it was more than 60 days from the denial decision date. But please keep in mind, we are trying to go forward and add the resubmittal type of claims again, and that's all I wanted to say. I wanted to give you a positive toward all the negative. Thank you.

Katherine Jett: Thank you, Candice. Thank you, Donna. At this time, I'll turn it back over to Keitra.

Keitra Hill: All right. Thank you, everyone. Thank you to all our speakers for presenting your updates and for all those good questions that we received.

Next, we want to move forward with closing out. Again, I'd like to say thank you for everybody for participating in today's call. Our next All VR Call date will be on Tuesday, April the 16, 2024, and that'll be from 1 to 2 p.m. Eastern Standard Time. As I mentioned earlier on the call, our documentation from this call, which will include the transcript, PowerPoint presentation, recap, and audio, and the handout in reference to the CPWIC training, will be provided and posted in the next few weeks on the Your

Ticket To Work website on the Events Archive page. So again, thank you all for your participation in today's call, and have a great rest of your day.