

TPM Welcome and Logistics

Keitra Hill, VR Payments Manager (TPM)

Keitra welcomed everyone to the call, provided logistics and turned the call over to Reneé Clarke to present information on Pre-payment Validation Reviews.

Pre-Payment Validation Reviews (PVRs)

Reneé Clarke, Payments and Systems Support Branch Chief (SSA) and Keitra Hill (TPM)

Reneé provided an explanation for the recent increase in PVRs. SSA noticed that not all Vocational Rehabilitation agencies (VRs) were getting PVRs, and that some were not getting an adequate sample of PVRs compared to the number of claims they submit. To enhance program integrity efforts, SSA is standardizing the PVR selection process for VR claims.

Keitra provided the following information about the PVR process.

The purpose of a PVR is to ensure that VR services and costs meet the requirements for the requested payment. For more information, VRs should refer to the VR Provider's Handbook, page 41.

VRs must include all of the following required documentation:

1. PVR Notice,
2. SSA-199 with costs in numerical order,
3. Proof of payment for requested services,
4. Signed Individualized Plan for Employment (IPE) or amended IPE, and
5. Case Notes.

Examples of acceptable proof of payment documentation are:

- Copies of all direct costs, including date of service, type of service rendered, cost of service, proof of payment.
- Copies of bills, checks, credit card, and EFT transactions.
- Receipts on vendor's letterhead with paid date stamp and signature.
- Authorizations and invoices with Warrant or Procurement numbers.

The presentation included several examples of the required documentation and their invoices with the warrant or procurement number matching the total paid amount on the proof of payment.

Questions & Answers

Question: The VR Provider Handbook states that information must be submitted within 45 days, but the letter states 30. Which is it?

Answer: You have a total of 75 days from the date of the PVR Notice to submit all PVR documentation.

Question: Where do we obtain the SSA-199 form?

Answer: The form can be found at this link <https://www.ssa.gov/forms/ssa-199.pdf>.

Question: What if the PVR notice has not been received in time to send PVR documentation?

Answer: Email VR.Helpdesk@ssa.gov to inform SSA that you are ready to submit your documentation, have not received the PVR Notice, and ask to be emailed a copy.

Question: The PVR notice that we receive from Social Security has the totals, number, all the information that's itemized on the SSA-199. Do we still need to complete the SSA-199 as well?

Answer: Yes, this must be a part of the documentation you submit for the PVR request.

Question: If we submitted a PVR by mail, but are now finding that we missed information, can we fax an update?

Answer: If the claim is still pending, you can fax the additional documentation. If the claim has been denied, you cannot fax the additional documentation.

Question: Would you like us to include numbers on our proof of payments to correspond with the SSA-199?

Answer: Yes, that would allow us to line up all the documentation with the direct cost listed on the SSA-199.

Question: Is submitting the case notes something new?

Answer: No, submitting case notes has always been a part of the procedure for the PVR documentation.

Question: If PVR documentation is requested and the claim is denied due to not submitting all the documentation in less than 75 days, can I appeal the denial?

Answer: Yes. You can email VR.Helpdesk@ssa.gov and SSA will review your request for reconsideration.

Question: When I upload a Cost Reimbursement claim I immediately move to fax in these items (SSA-199, Proof of purchase, IPEs etc.). Should I continue to submit or wait for the PVR request?

Answer: You can send the documentation as soon as you upload a Cost Reimbursement claim. When you receive the PVR Notice mail, fax that document in.

Question: Where can I find the VR Provider Handbook?

Answer: You can locate the VR Provider Handbook on the Your Ticket to Work website under State VR Agencies and VR Cost Reimbursement by clicking this link:

<https://yourtickettowork.ssa.gov//Assets/docs/vocational-rehabilitation/VR-Providers-Handbook-2020.pdf>

Reconsideration Policy

Renee Clarke

Renee provided the following update on the Reconsideration Policy.

On March 1, 2024:

- SSA started enforcing the longstanding 60-day filing restriction for non-earnings-related reconsideration requests from VR agencies for denied initial claims.
 - If a VR submits a request for reconsideration for an initial claim that was denied for a non-earnings-related reason, the request must be received by SSA within 60 calendar days of the denial decision date.
- SSA enacted a courtesy to extend the filing deadline for earnings-related reconsideration requests from 60 days to 365 days.
 - If SSA denies a claim due to insufficient earnings, the VR has 365 calendar days from the date of the initial denial to submit a request for reconsideration for that claim to SSA.
- If a VR agency's claim is denied but the claim represents a unique or nuanced situation, the provider may email VR.Helpdesk@ssa.gov for additional consideration.

New VR Help Line

Sharday Jenkins, Provider Support Manager (TPM)

The VR Help Line went live on March 1, 2024. The hours of operation are Monday – Friday, 9 a.m. – 5 p.m. ET. The Help Line phone number is 1-866-949-3687 and you must select option #4 to speak with a live agent.



The VR Help Line will handle the following inquiry types via phone:

- Payment Status: Status of VR payment submissions.
- Diary Status: Diary reasons and any additional actions and/or required documentation.
- Fax Documentation: Receipt confirmation of faxed payment documentation.
- Portal Access: Assistance with Ticket Portal access. (Ticket Portal enrollment requests must be submitted via email.)
- Portal Navigation: Assistance with Ticket Portal navigation. (Portal errors must be submitted via email.)

Questions & Answers

Question: Do you only get one reconsideration for all denials based on insufficient SGA earnings, correct?

Answer: Yes, you can only request a reconsideration one time for a denied claim.

Question: What can the VR do if they submit a claim, and it is denied due to not meeting the requirement for nine months of SGA and it takes the client over 365 to obtain SGA?

Answer: Send an inquiry to VR.Helpdesk@ssa.gov and SSA will grant you an additional consideration.

Question: What can a VR do if they disagree with the denial of a reconsideration claim?

Answer: Send an inquiry to VR.Helpdesk@ssa.gov with a justification as to why you feel the denial is incorrect.

Question: SSA previously advised me to hold reconsideration cases. Will I get the opportunity to send those in?

Answer: Send an inquiry to VR.Helpdesk@ssa.gov regarding those claims and SSA will provide further direction.

Question: Has there been any discussion at SSA about moving towards being paperless?

Answer: Yes, SSA is moving towards decreasing the amount of paper that we request and send to providers.

Question: Case notes have not been requested on all PVRs. Are all case notes now required, even if not listed among those documents requested?

Answer: Case notes have always been a requirement. Please refer to page 42 in the VR Provider Handbook.

PVR Documentation Requirements

For each validation review claim selected, SSA will request proofs to support the request for costs being claimed such as a copy of the IPE that list service(s) to be purchased; copies of pertinent progress notes; and a copy of the intake and closure statement, as appropriate.

Question: If we are requesting an extension on the due date of the PVR or a justification, is there any guidance on justification for the extension to be granted?

Answer: SSA allows 75 days for a VR to submit the requested documentation for a PVR. Justification for requesting an extension must be due to a situation outside of the VR's control.

Question: Do you only need case notes if they are pertaining to the expenses?

Answer: We need case notes pertaining to the beneficiary's progress and services provided by the VR that assisted with the Continuous Period of SGA.

Question: When I submit a Cost Reimbursement claim I immediately move to fax in these items (SSA-199, Proof of purchase, IPEs etc.). Should I continue to submit them or wait for a PVR request?

Answer: It's best to be proactive. If you have the documents available, you should continue faxing them with your claim and enter "Documents attached" in the Remarks tab.

Question: The PVR notice does not mention anything about case notes. Why are they now required?

Answer: Case notes have always been a requirement. Please refer to page 42 in the VR Provider Handbook. We are working on updating this notice. The notice mentions that you can mail the documents, and this is incorrect.

Today's Call

All documentation from this call will be provided to the to the Your Ticket to Work website in the next few weeks, under the Events Archives section.

Call Documents:

- Transcript
- PowerPoint Presentation
- Recap



- Audio

Next Quarterly All VR Call

The next All VR Call will be Tuesday, July 9, 2024, from 1-2 p.m. ET.

Please send All VR Call training suggestions to VR.Helpdesk@ssa.gov by Friday, May 25, 2024.