

TPM Welcome and Logistics

Keitra Hill, VR Payments Manager (TPM)

Keitra welcomed everyone to the call, provided logistics and turned the call over to Scott Logan to present information on Reporting Non-Work-Related Changes to Prevent Supplemental Security Income (SSI) Overpayments.

Reporting Non-Work-Related Changes to Prevent SSI Overpayments

Scott Logan, Lead, SSI Policy Team (SSA)

Scott provided the following information about reporting non-related changes to prevent SSI overpayments:

1. Leading Causes of SSI Overpayments

- Financial Accounts
- Wages*
- Living Arrangement Changes*

*Also, leading causes of underpayments

2. Types of Income for SSI Purposes

- **Earned Income** is wages, net earnings from self-employment, certain royalties, honoraria, and sheltered workshop payments.
- **Unearned Income** is all income not earned, such as Social Security benefits, pensions, state disability payments, unemployment benefits, interest income, dividends, and cash from friends and relatives.
- **Deemed Income** is the part of the income of a spouse or parents that live in the same household, or a sponsor (for a noncitizen), which we use to compute the SSI payment amount.
- **In-Kind Income** is food, shelter, or both that a recipient gets for free or for less than its fair market value.

3. Resources and Limits

- \$2,000 for an Individual/\$3,000 for a couple
- We look at the value of resources at the first moment of the month.

4. Resources

- Cash, bank accounts, stocks, bonds, land (you do not live on), life insurance, vehicles, and anything else that can be changed to cash for food and shelter and deemed resources.

5. Excluded Resources

- The home where you live with land, one vehicle, household goods and personal effects, life insurance with combined face values of \$1,500 or less, burial spaces, burial funds \$1,500 or less, ABLE accounts up to \$100,000.

6. Living Arrangements

- Living arrangements is another factor used to determine the amount of the SSI payment.
- SSI payment may vary depending on where the recipient lives, such as their own place, someone else's household, group home, or an institution.

7. Reporting Responsibilities

These changes must be reported to SSA because they may affect the recipient's eligibility and benefit amount.

- Change of address
- Change in living arrangements
- Changes in earned and unearned income
- Change in resources
- Death of spouse or anyone in the household
- Change in marital status
- Change in help with living expenses
- Eligibility for other benefits
- Enter jail or an institution
- And many, many, more

8. Resources

- Understanding Supplemental Security Income Homepage:
<https://www.ssa.gov/ssi/text-understanding-ssi.htm>
- Understanding SSI publication:

<https://www.ssa.gov/pubs/EN-17-008.pdf>

- Reporting Responsibilities:

<https://www.ssa.gov/ssi/text-report-ussi.htm>

Questions & Answers

Question: Will the information shared regarding Reporting Non-Work-Related Changes to Prevent SSI Overpayments be shared with the WIPA programs?

Answer: This information has been shared with WIPA programs and will be provided to other programs that work directly with beneficiaries.

VR Updates and Reminders

Keitra Hill (TPM)

Keitra provided the following updates and reminders about VR Payments:

1. VR Payment Statistics

- **Receipts:**
 - FY22: 27,055
 - FY23: 31,818
 - FYTD: 17,398
- **Payments:**
 - FY22: \$237,103,761
 - FY23: \$201,142,719
 - FYTD: \$124,382,568
- **Claims Processed:**
 - FY22: 29,726
 - FY23: 37,417
 - FYTD: 19,175

2. Common Payment Denials



- **Code 080 – Benefits Ended before VR Began**
 - Description: The Ticketholder's SSI or SSDI benefits ended prior to the start of VR services.
 - Tip to Avoid Denial: If possible, review the State Verification and Exchange System (SVES) to confirm the benefit status of the Ticketholder.
- **Code 220 – 8 Months or Less of SGA**
 - Description: 8 months or less of verified SGA level earnings were found in SSA's records.
 - Tip to Avoid Denial: If an initial claim was denied due to insufficient earnings, please wait an additional six months to submit a reconsideration claim to avoid another 220 denial.
- **Code 320 – 9 Months of SGA But Not Within 12 Month Period.**
 - Description: 9 months of SGA were found in SSA's records, but the 9 months are not within a continuous 12-month period.
 - Tips to Avoid Denial:
 - Check quarterly wage information to determine if 9 months are found within 12 months of the SGA level earnings identified.
 - If not, the SVRA must provide verifiable documentation of 9 months within 12 months of SGA level earnings.
 - If an initial claim was denied due to insufficient earnings, please wait an additional six months to submit a reconsideration claim to avoid another denial.
- **Code 620 - Untimely Filing (Initial Claims)**
 - Description - The initial claim was filed more than one year from the last month of SGA.
 - Tip to Avoid Denial: Review the earnings provided on the Vocational Rehabilitation Client Earnings Report (VRCER) to ensure you file the claims no more than one year from the last month of SGA.
- **Code 620 – Untimely Filing (Earnings Reconsideration)**
 - Description – The reconsideration claim for an earnings denial was filed more than one year from the decision date.
 - Tip to Avoid Denial: Review the notice of determination from the initial claim to ensure you file the reconsideration no more than one year from the decision date.
- **Code 620 – Untimely Filing (Non-earnings Reconsideration)**
 - Description: The non-earnings reconsideration claim was filed more than 60 days from the decision date.

- Tip to Avoid Denial: Review the notice of determination from the initial claim to ensure you file the reconsideration no more than 60 days from the decision date.

3. Pre-payment Validation Review (PVR) Reminder

- **Required PVR Documentation:**

- PVR Notice
- SSA-199 with costs in numerical order
- Proof of payment for requested services
- Signed Individualized Plan for Employment (IPE) or amended IPE
- Case Notes/Progress Notes

VRs have 75 days to submit all required documentation. If not received within 75 days, the claim will be denied.

- Denial Reason: 650 – The VR agency did not provide requested evidence.

4. Documentation Requests – Fax Confirmation

Reminder – When you fax documents, you must confirm that all the documentation has been received by SSA.

- Refer to page 93 of the Ticket Portal User Guide for instructions on checking the status of a fax.

5. Fax Status for this Pending Payment

- The Fax Status screen will show the date the fax was requested, name of the person who requested the fax, fax receipt date and the document type.
- If you faxed in your evidence but do not see a date in the fax receipt date field, the fax has not been received by SSA.
- You can resubmit your fax with the same fax cover sheet until the fax receipt date populates.

Communications and Outreach Updates

Jayne Pendergraft (TPM)

Jayne provided the following updates from the Communications and Outreach department.

1. Ticket to Work Program Outreach

- The Ticket Program Outreach Team promotes the Ticket to Work Program to eligible beneficiaries.



- Social media
 - [Facebook](#)
 - [X](#) (Formerly Twitter)
- [Choose Work! Blog](#)
- [Text messaging](#)
- [Fact sheets](#)
- [Success stories](#)
- [Work Incentive Seminar Event \(WISE\) webinars](#)

2. WISE Webinars

- WISE webinars are online events designed to explain the Ticket Program and Work Incentives through accessible learning opportunities.
 - Held on the fourth Wednesday of each month.
 - Average monthly attendance ranges from 400–600 participants, depending on the topic.
 - Next WISE topic is “[Ticket to Work and Reasonable Accommodations](#)” on July 24 from 3-4:30 p.m. ET.

3. Success Stories

- **Success stories** feature individuals who have achieved financial independence with the help of the Ticket Program.
- **Stepping stone stories** feature individuals who have made a major step on the path to financial independence but have not yet eliminated their reliance on benefits.
- **Amy and Jason:** features two individuals who worked with their State VR agencies and ENs to achieve financial independence through Partnership Plus.
- **Volunteer Your Way Success:** discusses how three individuals turned their volunteer skills into job skills with the support of the Ticket Program.

4. How Can You Share Success Stories?

- Promote success stories on social media.
- Become familiar with the stories and if you have a Ticketholder with a similar background, share with them.
- [Success Stories](#) are available online.
- For sample social media posts, contact socialmedia@choosework.ssa.gov.
- To submit success story candidates, send an email to

successstories@choosework.ssa.gov.

Questions & Answers

Question: When I receive a 080 denial for benefits ending before VR service began, but the Ticket Portal shows the Ticket has been In-Use with our VR agency for the period we are requesting. How can this occurrence be resolved?

Answer: Email VR.Helpdesk@ssa.gov to request a review of the Ticket status during the period of the cost reimbursement payment that you requested.

Question: What do I do if I want to submit a reconsideration request for a claim that was denied a 080 over 60 days ago and the Ticket was In-Use with our VR agency for the period we are requesting?

Answer: Email VR.Helpdesk@ssa.gov to request a review of the Ticket status during the period of the cost reimbursement payment that you requested.

Question: Regarding Ticket to Work outreach, when will the YouTube videos with the introduction of going back to work while receiving SSI or SSDI benefits be updated?

Answer: The Communications and Outreach department is currently working to update the YouTube videos. The updates will not include specific numbers that need to be updated annually.

Question: Can I submit a signed IPE addendum in lieu of the full Individualized Plan for Employment (IPE)?

Answer: You can submit an IPE addendum in lieu of the full IPE; however, we will review the addendum to determine if the information provided is sufficient. If additional documentation is required, we will reach out to your agency.

Question: Regarding the information shared on VR Payment Statistics, are there any projections on where we will end the 2024 Fiscal Year?

Answer: Currently there are no projected numbers for where we will end the 2024 Fiscal Year.

Question: Are there any updates on the pilot program to expand the Vocational Rehabilitation Cost Reimbursement program to reimburse State VR agencies for Pre-Employment Transition Services provided to disabled youth under age 18?

Answer: SSA does not have any updates on the pilot program now. If you have questions regarding the pilot program, email VR.Helpdesk@ssa.gov.

Question: What is SSA looking for in the case notes/progress notes requested for a Pre-payment



Validation Review (PVR)?

Answer: The case notes should include the description of the Ticketholder's employment goals, appropriate achievements towards those goals, and the appropriate combination of services that have been provided (to date) to assist the Ticketholder with achieving his or her employment goal(s). Amended IPEs should detail the services provided to assist the Ticketholders with meeting their employment goals and any changes or deviations from the initial employment goals and agreed upon services provided to help the Ticketholder reach those goals. The IPE or amended IPE should be relevant to the services you are providing to help the Ticketholder reach the current established goals.

Ticket Portal Suggestions: Several suggestions for Ticket Portal updates were shared during the Q&A session and those suggestions were noted. If the suggested updates are possible, SSA will inform providers of the updates as they occur. At this time, SSA cannot make any updates to the Ticket Portal.

Today's Call

All materials from this call will be posted to the [Your Ticket to Work](#) website in the next few weeks, under the [Events Archives](#) section:

- Transcript
- PowerPoint Presentation
- Recap
- Audio

Next Quarterly All VR Call

The next All VR Call will be Tuesday, October 8, 2024, from 1 p.m. - 2 p.m. ET.

- Please send All VR Call training suggestions to VR.Helpdesk@ssa.gov by August 31, 2024.