**Keitra Hill (Moderator):** Good afternoon, everyone, and thank you again for joining the July quarterly All VR Call. My name is Keitra Hill and I'm the TPM VR Payments Manager and I'll serve as the moderator for today's call. Before we begin with our agenda and presentation, I would like to advise you that this call is scheduled for 60 minutes, and it's being recorded and transcribed.

Now we'll move to our next slide and that is the agenda. First, I did provide the welcome. Next, I will go into some logistics. We will have a presentation on Reporting Non-Work-Related Changes to Prevent Supplemental Security Income (SSI) Overpayments. After that, we will go into our first Q&A session. That will be followed by VR Updates and Reminders. Next, we have an update from the Communications and Outreach Department, and then we'll have our second Q&A session.

Next, to go over a few logistics for today's call. This call is being recorded and transcribed. Post-call items will be on the Your Ticket to Work website in the next few weeks. Participants are not permitted to record this meeting nor capture the transcript. During the Q&A session, if you are joining via the phone and you wish to ask a question, please raise your hand utilizing star 5 and you'll be unmuted by the facilitator and then you'll press star 6 to unmute yourself. If you're joining on the Microsoft Teams application, you want to click on the raise hand icon at the top of the screen, and you'll be unmuted by the facilitator to allow you to unmute your microphone to ask your question. Next. Please ask one question each time you are called upon by the facilitator. Any additional questions or comments can be sent to VR.Helpdesk@ssa.gov. Those questions that we're not able to answer during this live session will be forwarded to the appropriate panelists for comment. For closed captioning, it is available for participants who are joining via the Microsoft Teams application or utilizing the separate closed caption link provided. To turn on the closed captions in Teams, you want to go to the More option at the top of the screen and then click on Language and Speech, and next, Turn on Live Captions. If you're using the Link option, you want to paste that link into your browser, and it will open a separate window for you to view the closed captions.

Next, we will have a presentation on Reporting Non-Work-Related Changes to Prevent Supplemental Security Income (SSI) Overpayments, which will be provided by Scott Logan, the Team Leader of the SSI Policy Team. Scott, please go ahead.

**Scott Logan (SSA):** Thank you. Again, I'm Scott Logan. I'm a Supplemental Security Income (SSI) National Policy Expert, Team Leader for many of the non-medical policy aspects of the SSI program. We are requesting your assistance in reminding our SSI recipients of the importance of reporting changes in addition to work changes that could affect their eligibility and payment amounts. Reporting necessary changes also leads to the prevention of overpayments.

As you may be aware, the SSI program provides monthly payments to adults and children with a disability or blindness and to adults aged 65 and older who have limited income and resources. The current full monthly SSI federal benefit payment for an individual is $943 a month and $1,415 a month for an eligible SSI couple.

The leading causes of SSI overpayments are too much money and financial accounts, wages, basically non-reporting or earning more than the estimated wage that we have on their record and living arrangement changes. It's also of note that two of the wages and living arrangement changes also are leading causes of underpayments.

Next slide, please. As I mentioned earlier, SSI is for people with limited income and resources. We look at income to determine SSI eligibility and the correct SSI payment amount. There are two types of income. Earned Income, which you are familiar with, which are wages, net earnings from self-employment, certain royalties, honoraria, and sheltered workshop payments. Unearned Income, which is all income that is not earned such as Social Security benefits, pensions, state disability payments, unemployment benefits, interest income, dividends, and cash from family and friends. Now there are two additional types of income that are a subset under unearned income that we look at. Deemed Income, it is the part of the income of a spouse or parent that live in the same household or a sponsor for a non-citizen, which we use to compute the SSI payment amount. You will want to remind individuals you work with that if they have children on SSI, they also need to make sure they inform us of that. They could just be getting Social Security disability, but their child might receive SSI. Just a queue to ask them if they have any children on SSI. The other type of income is what we call an In-Kind Income. It is food, shelter, or both that a recipient gets for free or less than its fair market value.

Next slide, please. We also look at things people own to determine their eligibility for SSI. There are resource limits in order to be eligible for SSI. The amounts are set forth in the Social Security Act. The resource limit for an individual is $2,000, while it is $3,000 for a couple. We look at the value of resources at the first moment of the month. Resources are cash, money in a bank account, stocks, bonds, land that they do not live on, life insurance, vehicles, and anything else that could be changed to cash for food and shelter and deemed resources. It is very important for the recipients you assist to be mindful of their bank account balances. When recipients deposit their earnings into their bank account, we look at the value of that money on the first moment of the following month. If they do not deposit their earnings but retain the cash into the next month, we count the cash towards the resource limit. There are resources that we do exclude that are set forth in the act. The home where someone lives with land, one vehicle, household goods, and personal effects, life insurance with a combined face value of $1,500 or less, burial spaces, burial funds of $1,500 or less, and Achieving a Better Life Experience (ABLE) accounts up to $100,000. Next slide.

Living Arrangements are another factor used to determine SSI eligibility and the amount of the SSI payment. SSI payments vary depending on where the recipient lives, such as their own place, someone else's household, a group home, or an institution.

Next page. Now that you're familiar, here are some of the major reporting responsibilities of changes that must be reported to us. Don't worry about jotting all this information down. It's going to be provided on a link that you can reference. We do need to know about change of address, change in living arrangements. That means anybody that moves into or out of their home, changes in earned and unearned income, changes in resources, the death of a spouse or parent or anyone else in the household, changes in the marital status, changes in health with living expenses, eligibility for benefits, if they enter jail or an institution. In the link provided you'll see there's a lot more other less common things that need to be reported as well. Okay. Next slide, please.

These links here should be provided to you in the chat. You can also write them down if you'd like. What I've just gone over with you is in the Understanding Supplemental Security Income publication, that's the second link. That's a PDF that you can actually print out if you want. It's a very lengthy document. We also have a website that provides it easy and web pages with the same information that's in the publication. That is on the first link. The third link is the reporting responsibilities, which is actually found within the Understanding Supplemental Security Income homepage. You'll see a link for that. But that's a direct link to the reporting instructions. In case anybody asks you why you're talking to them, what are the reporting instructions, they should have them.

Now, be mindful that reporting instructions should not be unfamiliar with people that you deal with. If they're on SSI, they're given the reporting instructions with the Cost-of-Living Adjustment (COLA) notice that we provide every year. Anytime they have a redetermination where we review their income and resources, we do that every so often with people to get the reporting instructions. Anytime there's a change in their notice of change in payment, there should also be things to remember to report. The beneficiary's representatives that you work with, with us reporting should not be unfamiliar with them.

Next slide. Okay. That's all I have to present. I guess I'm free now to take any questions that you might have.

**Keitra Hill:** If you have any questions, I know I saw a hand raised. We will certainly get to you. Please go to the next slide so I can provide instructions on how to raise a hand in the chat or ask a question. You want to raise your hand, dialing star 5, and you'll be unmuted by the facilitator, then you'll press star 6 to unmute yourself. You can enter any questions into the Team's chat. If you would like to raise your hand and ask a question live, you will be then unmuted by the facilitator, and you can unmute yourself and proceed with asking your question. We do ask that you please provide your state, your name, and the VR agency and then ask your question. I know we did have one hand raised. Katherine, can you identify that individual, please?

**Katherine Jett (TPM Logistics):** Hi, yes, Keitra. We had Betsy. Betsy, you're unmuted, if you'd like to ask your question. If you'll click your microphone up top and that will unmute you. Okay. Well. Oh, there you go. Go ahead, Betsy.

**Betsy:** That was an error.

**Katherine Jett:** Oh, okay. Well, thank you.

**Keitra Hill:** No problem. No worries.

**Katherine Jett:** Okay. We have one other. We have Thomas. Thomas, you are unmuted. Just click the microphone up top and ask your question, please.

**Thomas:** Yes, good afternoon. I'm Thomas from New Jersey VR. I don't necessarily have a question regarding what I just heard, but I just tried logging into my account today, and on Monday, I received an email about my security, my Social Security statement being available. And now when I log into my account, that's what appears and not the information to be able to access all the things for, you know, with In-Use files or uploading VRCER files or checking a Social Security participant via their Social Security number. I was just wondering, and I think I've had this issue before, but how do I convert back to that screen when I log in, instead of it reverting to that screen of my personal benefit statement?

**Keitra Hill:** I got you. For assistance with that, I'd ask you to email VR.Helpdesk@ssa.gov, and they'll be able to assist you with getting to the Ticket Portal where you want to be.

**Thomas:** Okay. Thank you.

**Keitra Hill:** You're welcome.

**Katherine Jett:** And that's all we have with the raised hands, Keitra.

**Keitra Hill:** All right. Brionna, do we have any questions in the chat?

**Brionna Hale:** No, we do not.

**Keitra Hill:** Okay. Well, all right. Of course. Yeah, I can hear you. Go ahead.

**Scott Logan:** Okay. Yeah, someone did ask a question about if I presented with WIPA, and I did do a presentation with them last week that was a lot more detailed than this presentation and I am going to be presenting at two other conferences that we work with. I forget the names of them, but I'm going to be providing the same overview with them too.

**Renee Clarke (SSA):** Hi, Scott. That'll be the Protection and Advocacy for Beneficiaries of Social Security (PABSS) conference and the All EN Call, I believe.

**Scott Logan:** Yep.

**Keitra Hill:** All right. Thank you so much. And thank you for that question. I believe there are no other questions in the chat. I don't see any raised hands at this time, so we'll move forward with our presentation for today. And that will be me. I'll be moving into the VR Updates and Reminders.

First, some VR Payment Statistics. For receipts, and we have from Fiscal Year 2022 to Fiscal Year-to-Date. Receipts, Fiscal Year 2022, we had over 27,000 receipts. Fiscal Year 2023, over 31,000 receipts. In the Fiscal Year to Date, we've had 17,398 receipts. For payments, Fiscal Year 2022, we had over $237 million in payments, Fiscal Year 2023, over $201 million in payments. Then Fiscal Year to Date, we've paid $124,382,568. Thank you all for submitting your claims. I know with new processes we will receive more. For claims processed for Fiscal Year 2022, we had over 29,000 claims processed. Fiscal Year 2023, over 37,000 claims processed. In the Fiscal Year to Date, we've processed 19,175 claims.

Next, to give some information about common payment denials, so we have a few that we want to share along with a description and some tips to avoid that type of denial. Our first denial code is 080, and that's Benefits Ended Before VR Began. Specifically, that means that the Ticketholders' SSI or SSDI benefits ended prior to the start of VR services. A tip to avoid this type of denial, if possible, review the State Verification and Exchange System, SVES, to confirm the benefit status of that Ticketholder.

Our next denial code is, next slide, please. Thank you. 220. That is Eight Months or Less of SGA, specifically Eight Months or Less of verified SGA level earnings were found in SSA's records, so that's less. A tip to avoid this is 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.

Next, we have a 320 denial. With this, Nine Months of SGA, But Not Within the 12-month Period. Nine months of SGA were found in SSA's records, but the nine months are not within a continuous 12-month period. The first tip for this denial is to check the quarterly wage information to determine if nine months are found within 12 months of the SGA level earnings identified. If not, the VR must provide verifiable documentation of nine months within a 12-month period. Another tip for this 320 denial is next. 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.

Our next code is a 620. We have a few different scenarios for the 620. The first would be Untimely Filing for an Initial Claim. This is when the initial claim was filed more than one year from the last month of SGA. A tip for this is to review the earnings provided on the Vocational

Rehabilitation Client Earnings Report, VRCER, to ensure you file the claim no more than one year from the last month of SGA.

Next, still with the 620 denial, we have an Untimely Filing for Earnings Reconsideration. The reconsideration claim for an earnings denial was filed more than one year from the decision date. To avoid this denial, you want to review the notice of determination from the initial claim to ensure you filed the reconsideration no more than one year from the decision date.

Next, our last Untimely Filing for Non-earnings Reconsiderations. The non-earnings reconsideration claim was filed more than 60 days from the decision date. To avoid this denial, you want to review again that notice of determination from the initial claim to ensure you file the reconsideration no more than 60 days from the decision date.

Next, we have a reminder for our Pre-payment Validation Review. The required documents for the review are the PVR Notice, the SSA 199 with cost in numerical order, the proof of payment for requested services, the signed Individual Plan for Employment, IPE, or any amended IPE. And lastly, case notes or progress notes. VRs do have 75 full days to submit all required documentation. If not received in that 75 days, the claim will be denied with code 650, meaning the VR Did Not Provide the Requested Evidence. As mentioned on our previous call for the PVR Notice, if you don't receive it when you're ready to submit your documentation, please reach out to the VR Help Desk to get a copy so you can submit that.

Next, we have a Documentation Request, so Fax Confirmation. Quick reminder, when you fax documents, you must confirm that all the documentation has been received by SSA. You can refer to page 93 of the Ticket Portal User Guide for instructions on checking the status of a fax. And here are some quick points to get you there. First, you want to select the “View All VR Pending Payments For Me” link from the main menu. Once you've clicked that, you want to click the “Actions” link on the entry for the applicable claim. And then next you want to click the “Show Fax Status” link, and that will show you the status of your fax.

Next, a quick screenshot of what that will look like when you get to the end. So here the Fax Status for Pending Payments. The fax status screen will show you the date the fax was requested, the name of the person who requested the fax, the Fax Receipt Date and Document Type. If you fax in evidence but do not see a date in the Fax Receipt Date field, the fax has not been received by SSA. If that occurs, you can resubmit the fax with the same fax cover sheet until the fax receipt date populates.

Next. That's all for VR Updates and Reminders. Next, we will have some updates from the Communications and Outreach team, which will be presented by Jayme Pendergraft, the Director of the Communications and Outreach team. Jayme, please go ahead.

**Jayme Pendergraft (TPM):** Thanks so much, Keitra, and good afternoon, everyone. I'm so happy to join this month's VR Call to talk a little bit about our outreach materials and some updates.

Next slide, please. For those of you who might be new to this call or need a little bit of an update, the Communications and Outreach team is responsible for promoting the Ticket Program to eligible beneficiaries, their friends, families, and community organizations, including, of course, VR and ENs. We promote the program through a variety of channels and Brionna is adding all of the links on this slide to the chat. We encourage you to give us a follow and to share information through your organization's social media channels if you're able. One of the channels not on this list is YouTube and that's because we haven't had much new content on there in a while. I'm happy to share that we'll be releasing a series of new Ticket to Work and employment-related videos. Please watch our social media and website along with your GovDelivery emails for more updates.

Next slide, please. Today, I'd like to focus on a couple of our outreach activities. The first are our Work Incentive Seminar Event or WISE webinars. These are national accessible webinars that are held on the fourth Wednesday of every month. During the holiday season, that schedule changes a little bit, but for the most part, you can find us on the fourth Wednesday at 3 p.m. Eastern. This month, our presentation recognizes the anniversary of the Americans with Disabilities Act, and we'll discuss Ticket to Work and Reasonable Accommodations. We encourage you to join us on July 24 and share the information with eligible Ticketholders and your colleagues. You can register online at choosework.ssa.gov/wise and visit our social media pages to like and share our posts. We do typically see around 400 to 600 people attend our webinars and it's a really good opportunity for people to get some introductory information about the Ticket Program before they decide if they'd like more information and a follow-up with a VR or an EN. Next slide, please.

Next, I'd like to talk a bit about our success stories. We have two types of success stories. The first are our basically full success stories, which feature individuals who have achieved financial independence with the help of the Ticket Program. They are no longer receiving disability benefits and they have been working for a bit of time when they're featured as success stories. Our stepping-stone stories feature people who have made a major step on the path to financial independence but have not quite eliminated their reliance on benefits. This might be someone who has pursued an educational degree or someone who may have something like bought a car so now they can start trying to work, things like that; or maybe made a move somewhere that enables them to have more access to open job positions. It's someone who is just still receiving their benefits but has taken a pretty big step on the path to financial independence.

Next slide, please. This slide features a couple of our recent success stories. The first one is about Amy and Jason, and this story features two people who worked with their state VR agencies and ENs to achieve financial independence through Partnership Plus. This story explains what Partnership Plus is and the importance of VRs and ENs working together for Amy and Jason's financial independence and outcomes from the Ticket Program. And then the other one is called Volunteer Your Way to Success. And this talks about how three individuals turned their volunteer skills into job skills with the support of the Ticket Program.

Next slide, please. As with our other materials, we invite you to share our success stories. You can promote success stories on social media. If you have a Ticketholder with a similar background, you can share them with them. We have people with a variety of different backgrounds, disabilities, job experience, family experience. There's likely someone featured on our website that might resonate with your audience in a particular fashion, so we encourage you to check those out. They are available online, and Brionna is pasting some of the links in the chat as well. If you ever want some sample social media posts to share, you can contact us at socialmedia@choosework.ssa.gov and you can also submit success story candidates by sending an email to successstories@choosework.ssa.gov.

Just be sure not to include any PII in there. We are always looking for new candidates so please reach out if you have a good story. If you're not certain if the person is ready for a success story yet, feel free to send us an email and we can jump on a call with you to discuss it, or if you have any questions about what a good success story lead might look like, we're happy to talk about that with you as well. I hope you're able to put some of these materials to use by sharing with Ticketholders. We know that many of you may not coordinate your organization's social media platforms, but as a social media manager myself, I can tell you we're always looking for new content. So please give them a heads-up that we have a large variety of content available and we're always happy to collaborate with other organizations.

Feel free to reach out to socialmedia@choosework.ssa.gov if you have any questions, would like some content to share, or have a success story to share and we'll be happy to talk with you. With that, I will hand it over to the next slide and back to Keitra.

**Keitra Hill:** Thank you so much, Jayme, for those updates. So now we have our second Q&A session. This is open for all questions whether it was for Scott or whether it was for any other information shared.

On the next slide, just a few points about how to ask a question. If you are on the phone, you want to raise your hand by dialing star 5, you'll be unmuted by the facilitator, then you'll press star 6 to unmute yourself. If you're on Teams, you can enter your question into the chat or you can raise your hand and your microphone will be unmuted, and then you can unmute yourself. Again, please state your name and your VR name and ask your question. Katherine, I do believe we have one raised hand.

**Katherine Jett:** Hi, Keitra. Yes, we do. Eugenia, you are unmuted. Please, click your microphone up top to unmute and ask your question.

**Eugenia:** Hello. I have posted several questions in the chat, but since we are only limited to one question, I'm assuming that's not including the chat.

**Katherine Jett:** Correct.

**Eugenia:** Is that correct? Okay. When you went over the 080 denials for Benefits Ended Before VR, I've been getting those denials. But when you go into the Portal, they clearly have a Ticket. And it's clearly available for assignment and it's clearly in use with us or has been In Use with us for that period that we're claiming on. You know, I just found my second one like that. What do you want us to do when that's the case? If they didn't have benefits, the Ticket wouldn't have been put In Use with us. And so, I don't quite understand why we'd get that denial and why we have to keep sending in inquiries. And it's a non-related, non-wage-related inquiry. If that denial was for a reconsideration, what do we do after that?

**Keitra Hill:** In that case, if oh, I'm sorry if somebody else is on it. Okay. I was just saying in that case if something comes up this unusual and you feel like you said in this scenario where it's, you know, it's available for you to assign, why are you getting a denial saying that it was not available for you to, you know, even request the payment for. In those cases, as you have done in the past, I would continue to send an inquiry to the VR Help Desk. Because they will be able to go into the system and see what specifically happened to make that come up that way, therefore, you know, us processing it as a denial.

**Eugenia:** Yeah, what happens if we catch it after the 60 days? If we resubmit it, if it's already a reconsideration, we have no other options.

**Keitra Hill:** Even in that case, you can still reach out to the VR Help Desk and let them know that submitted it, you know, yes, it is after the 60 days; however, you know that at the time that you requested the payment, at the time the Ticket was available and should have been able to be processed for payment seal. Any issues that you find when submitting a payment, if you get back a denial that just makes no sense at all, I would definitely refer you to the VR Help Desk for them to explain what happened.

**Eugenia:** Even if it's over the 60 days.

**Keitra Hill:** Yeah, even if it's over the 60 days.

**Eugenia:** Okay. Thank you.

**Keitra Hill:** You're welcome.

**Katherine Jett:** Thank you, Eugenia. Keitra, we have Kristen. Kristen, your microphone is active. If you'll click yours to unmute.

**Kristen:** Hi, thank you. Can you hear me?

**Katherine Jett:** Yes, I hear you.

**Kristen:** Okay. This is Kristen from New Hampshire VR. I just have a question or maybe looking for more information that's not ready to be released, but in reference to the Ticket to Work Outreach program. So I know that there was mention of updating YouTube videos, which I'm super excited about because there's currently two outdated videos that is like a quick little intro of like you're on SSDI and what it's like going back to work in SSI and going back to work, but because SGA and other figures are mentioned in there. I used to love giving it out for that quick, like somebody got a job before they got benefit counseling from us and they need that just too like, okay, what it's going to be like going back to work? And then yes, they'll be getting benefits counseling. I wonder if you can give any inside scoop if videos like that are on the horizon, and if so, will they be generic to not have SGA figures in there or will they be updated every year so that the information is current?

**Jayme Pendergraft:** Hi, Kristen. This is Jayme. Great question. And I'm from New Hampshire too, so hi. But I do want to say that, yes, they will be much more generic. You're going to see videos like What is Ticket to Work, What are Work Incentives, things like that. We're not going to talk about SGA in terms of 2024's SGA and you will not see any specific numbers that will need to be updated annually. I truly hope that these are helpful. I'm happy to hear that you used to use the other ones and would love to get any additional feedback from anyone in the audience about what may be helpful to help promote the Ticket Program to the people that you speak with.

**Kristen:** Thank you for that. And I do hope those two videos that you just mentioned like Ticket to Work and certain work incentives, but I do think that those two distinct videos of like, I'm on SSI and going back to work, and I'm on SSDI and going back to work were very helpful. I hope maybe a video like that will also maybe be on the horizon, even though I know it's hard kind of making them generic. But I thank you. Yeah, I did love the videos because we could quickly send it off to somebody, you know, they didn't have to like to wait on me or somebody else to get back to them to give them answers. It's like, great, here it is, check out this video, hopefully, that will help you.

**Jayme Pendergraft:** And it's Jayme. Like I said, we don't get into too much specific information, and I can't give too much of a spoiler alert, but Kristen if you want to reach out to me, feel free to send an email to [socialmedia@choosework.ssa.gov](mailto:socialmedia@choosework.ssa.gov) and I can point you in the direction maybe of some of our fact sheets that could be a bit more helpful because those are obviously easier to update regularly than a video is.

**Katherine Jett:** Thank you, Kristen. All right, Keitra, we have Shelley. Shelley, you have access to your microphone. Please click yours and unmute.

**Shelley:** Hi, can you hear me?

**Katherine Jett:** Yes.

**Shelley:** Good. Shelley Paquette for Minnesota VR General. I wish I would have written down the slide number, but it was the PVR, and it spoke of the required documents, and it was listed as the IPE or the addendums or amendments. And so, my question is, if we're able to submit a signed addendum or amendment, is that acceptable in lieu of the initial signed IPE if for some reason we're not able to locate that if we've transitioned from paper to electronic, whatever the case may be; is a signed amendment addendum equivalent?

**Keitra Hill:** Okay. I would defer that question to SSA. Is a signed addendum or amendment, acceptable in lieu of the full initial IPE that was signed?

**Shelley:** The slide said or, so I'm curious for clarification on that.

**Keitra Hill:** Got you. Thank you. So again, yeah, go ahead.

**Renee Clarke (SSA):** Sorry. Hi, Good Afternoon. This is Renee Clarke. We would have to see the addendum in order to make that determination. Some contain more information than others. If that's a situation that you've encountered, feel free to email us at [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov), and we can advise you on that specific case.

**Shelley:** Okay. If our addendums clearly states the initial IPE date but then has the updated services that are being provided or supports, I'll maybe troubleshoot and send one off and see what you say. Thank you.

**Renee Clarke:** Yeah, that's a great idea. Thank you.

**Katherine Jett:** Thank you, Shelley. All right, Keitra, we have no more raised hands this time. Just to remind everybody, if you'd like to ask a question, please click the raise hand icon. But we have Kristen again.

**Keitra Hill:** Go ahead, Kristen. Please unmute yourself.

**Kristen:** All right, thank you. If there's no other questions, I'll ask another one. I don't have the numbers in front of me, but I think the first slide on this was going to VR Payments and Statistics. I know that there's like, why we have another quarter left to this fiscal year, is it on track where like the payments and claims processed are going to be greater than last year or do you have any data like are we on track where it's going to be less, same, greater, any inside scoop?

**Keitra Hill:** Sorry, talking on mute. If you could, please repeat that question because that will be one of that I will refer to SSA.

**Kristen:** Sure. So, there was a slide at the very beginning that gave the VR Payments and Statistics information. It gave payments and like claims processed year to date. I was just wondering if the projections are that, you know, things are going to be status quo compared to last year, more, estimated less?

**Keitra Hill:** So as far as the projections for what will be I guess received or paid out, that would be based on the documentation that is submitted, you know, whether we're able to move forward with that. It's looking like year over year, it's climbing, you know, as we have different pilots that have started for you to submit payments and different, you know, projects and things like that, there will be an increase. We anticipate that it will climb. But we don't have a specific projection right at this time.

**Kristen:** Okay.

**Katherine Jett:** Can we go back to slide 15?

**Keitra Hill:** Yes. So, can we go back to slide 15 in the presentation where that information was listed?

**Katherine Jett:** Okay.

**Keitra Hill:** I'm pulling it up now, Katherine.

**Katherine Jett:** Okay, good. I was about to.

**Keitra Hill:** All right. There we go. All right. Let's go down to that slide. So that's what you were talking about, correct?

**Kristen:** Yeah, because thank you. Because that's where I think like payments were greater in Fiscal Year 22 than 23, but claims processed were more in 23 than 22. I didn't know if there was any projections for where we're going to end up in Fiscal Year 24.

**Keitra Hill:** Yeah, right now we don't have any projections where we feel like we will fall. But I mean, seeing as though it is June, and we're up to about $124 million in payments, 17,000 receipts, you know, I would anticipate it would be more than Fiscal Year 23 at this point, just looking at the information we have right now, but we don't have any specific projections.

**Kristen:** Okay, thank you.

**Keitra Hill:** Thank you.

**Katherine Jett:** Thank you, Kristen. We have a few questions in the chat. We have one more raised hand. Keitra?

**Keitra Hill:** All right. Let's move to some questions in the chat. Sorry about that. Brionna, if you could go ahead and read the first question? I believe it was one that hasn't been answered. It was from Eugenia.

**Brionna Hale:** Yes. She asked. I asked the VR Help Desk to explain about the login conversion for the SSA website Portal. I'd also ask someone to explain why we are receiving letters asking for data on direct costs that don't fall within the payment period when those payments clearly fall within the payment period. Will someone be addressing these?

**Keitra Hill:** So again, that question is, Eugenia said you had to ask the VR Help Desk to explain the login conversion for the SSA website or Portal, and you had some questions and wanted some explanation as to why you're receiving a letter asking for data or direct calls that don't fall within the payment period when those payments clearly fall within the payment period. So that I would defer that question to SSA. So again, the question okay, go ahead.

**Renee Clarke:** Hi, this is Renee Clarke. Eugenia, regarding the second part of that question, if you can send us that specific information for that request to the help desk, we can give you more information.

**Keitra Hill:** Thank you, Renee. Thanks.

**Brionna Hale:** Okay. And we had another question from Colleen. The question states, "Would it be" and this is regarding the Portal fax status page, "Would it be possible to include the barcode number for each barcode cover sheet submitted when submitting a long list of faxes? It can be very difficult to determine which faxes have or have not been received when the only information provided is the date generated, order in which they were generated category, and date received. Sometimes I'm getting messages. Sometimes the order in which we submit information may change due to the need to break up a large fax that is not going through into multiple documents. It makes it very difficult to track."

**Keitra Hill:** Okay. So, Colleen, let me make sure that I'm understanding your question correctly. Are you asking on that fax status page if we could add a column to identify the barcode for that particular fax? Am I getting that question right? Okay. So, that is a question in reference to the Ticket Portal in the system. So that question would be for SSA. Is there a possibility of adding a column in that fax status page in the Ticket Portal to include the barcode number for the fax that's being submitted? Let's see. All right.

So, again, that question I was posing towards SSA is just in general if it's possible in a Ticket Portal to add a column to identify the barcode for each fax that's being submitted, that for, you know, allowing the VR to know, okay, that particular fax has been submitted. Now, let me submit my next group of documents.

**Alexis Thomas (SSA):** Hi, Keitra. This is Alexis. I responded. We have the suggestion, but at this time, we can't make any changes to the Portal.

**Keitra Hill:** Thank you, Alexis. Much appreciated. And thank you for that suggestion, Colleen, that I feel like that would be really helpful. So maybe we can put that on our wish list. Thank you. Brionna, are there any other questions in the chat?

**Brionna Hale:** Yes, there are a few more. One question was, "I was wondering if there were any updates on this program. It sounds promising. The Social Security Administration will be expanding the Vocational Rehabilitation Cost Reimbursement program to reimburse State VR Agencies for Pre-Employment Support Services provided to disabled youth under age 18."

**Keitra Hill:** Okay. That is in reference to a pilot program that is going on right now. At this time, SSA does not have any additional information to share on that topic. Of course, if you've heard about it, if you have any questions about that pilot, you can certainly email the [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov). I believe there's one yeah.

**Katherine Jett:** Yes. This time, if can we go back to the directions on the PowerPoint for unmuting?

**Keitra Hill:** Got it. Okay. We go all the way to the bottom. There we go.

**Katherine Jett:** Thank you.

**Keitra Hill:** You're welcome. If you're calling over the phone, you want to raise your hand by dialing star 5 and you'll be unmuted by the facilitator, and then you'll press star 6 to unmute yourself. You can also, as you have, enter questions into the chat, or you can raise your hand in the chat if you'd like to ask a question live, and we can unmute you at that point, and then you'll unmute yourself to proceed with asking your question. Katherine, to that point, do we have any raised hands?

**Katherine Jett:** Yes, we do. We have Raquel. She's unmuted.

**Keitra Hill:** Oh, yes, please, Raquel, go ahead.

**Katherine Jett:** If you'll press star 6 to unmute yourself. There you go.

**Raquel Donaldson (SSA):** Can you all hear me now?

**Keitra Hill:** Yes.

**Katherine Jett:** Yes, ma'am.

**Raquel Donaldson:** It's so new to me if I'm not in front of my laptop. Thank you.

**Keitra Hill:** You're very welcome.

**Raquel Donaldson:** I wanted to go back to address Eugenia's question in regard to requests for direct costs. And I believe, Eugenia, you had reached out to me in regard to this, and I explained it to you, but I'll explain it again. When the VR shows just one direct cost listed on a claim, there was a time when we were allowing VRs as a shortcut per se to literally, if you had, let's say, 20 costs and bunch it all together and send it to us. We're just making sure that that's not still happening, even though it could be a smaller amount. We've asked the technicians just to show us the SSA 199 that shows it's only one direct cost there and not, again, a lot of direct costs bunched into one total, if that makes sense. That's all I had.

**Keitra Hill:** Thank you, Raquel.

**Katherine Jett:** I had one.

**Raquel Donaldson:** You're welcome.

**Katherine Jett:** Thank you, Raquel. I think it was regarding the information when assigning a Ticket. Is it possible for the Portal to indicate that the Ticketholder will receive SGA at the general level or the blind level? If we would go ahead and, SSA, we appreciate the information and they're going to add that to the list of possible enhancements. Thank you very much. We have a couple of raised hands, actually three, Keitra, if you'd like us to go ahead.

**Keitra Hill:** Yes, please go ahead to the raised hands. Thank you.

**Katherine Jett:** All right, Roberta, you are unmuted if you'd like to ask a question.

**Roberta:** Hi. This question I hesitate a little bit to ask it. My name is Roberta, I'm from Indiana. But I'm going to ask it anyway. You mentioned that for PVRs, one of the things that needs to be collected or submitted is case notes and progress notes. And I'm just sort of wondering for my own information that I could then share with my leadership team with VR like what are you hoping to find or to see in case notes?

**Keitra Hill:** I'll speak to that, and SSA, please jump in if there's anything that I'm missing. But as far as the case notes, it would describe the services that you've provided to the Ticketholder over time. Any progress they've made towards meeting their goals, you know, any conversations or meetings that you've had with them to get there, you know, what are their goals that could be part of the case notes initially. And then from that, it would grow into these are what we've established within your IEP as far as goals. This is how we're meeting those goals at certain time periods. And, you know, so all the details of the services you provided, conversations that you had to help the beneficiary to get to financial independence. SSA, please jump in if I'm missing anything with that point.

**Renee Clarke:** Hi, this is Renee, Keitra, you're accurate. We're just trying to validate the information, the services that you've provided to the beneficiaries. Thank you.

**Keitra Hill:** Thank you.

**Roberta:** Thanks.

**Katherine Jett:** All right. We have another raised hand. Eugenia, your microphone is active. If you'd like to ask your question.

**Eugenia:** Yes. Can you hear me?

**Katherine Jett:** Yes.

**Eugenia:** I wanted to thank Raquel because I put that question out so everybody could hear the answer because pretty much everybody had that same question. And the other question I'd asked was about converting for the login. I already know the answer, but I wanted SSA to clarify it for everybody, for the few of us that have to convert, and whether we're required and everything else. I'm not necessarily asking for myself, I'm asking so that everybody can hear it, the answer. I just wanted to let you know that. And I wanted to thank Raquel for chiming in there because that is a question that has gone around about those letters we've been getting. I don't know of anybody that's still doing those, combining all those direct costs together. That was way in the beginning. So that's what was the confusing part about it. So, all right, that was it. Thank you.

**Katherine Jett:** Thank you.

**Keitra Hill:** Thank you.

**Katherine Jett:** Hey, Keitra, we have one more raised hand. Thomas, you're unmuted.

**Thomas:** Thank you. Again, Thomas from New Jersey, from DVRS. I was just wondering if there was a possibility to create a section within the Portal that had a sampling of the different letters that are sent out to potential Ticketholders when it comes to the unassignment of Tickets, and so forth. I think oftentimes we don't or at least I don't always see all the letters that are sent out until maybe it's brought to my attention from another EN or given to, you know, something's given to me from a local office. Is there a way to put a section on the Portal where you know, you could have sample letters different letters that are sent out for different scenarios? That would be my question.

**Keitra Hill:** Thank you for that question, Thomas. We definitely can take that, you know, back, write that down as possibly another wish list item for the Ticket Portal. Thank you for the suggestion. We'll definitely make a consideration for that.

**Thomas:** Thank you.

**Keitra Hill:** Katherine, yes, Eugenia. Katherine, can you go ahead and unmute her again, please?

**Katherine Jett:** Yes, absolutely.

**Eugenia:** I just have one more wish list add. Is there any way when you go in to print the diaries into an Excel spreadsheet that you can add the due dates? When we print out the list of diaries, it doesn't have any due date information. So, we have to go individually and look at each diary to be able to get that information.

**Keitra Hill:** Okay. Noted. Thank you.

**Eugenia:** Thank you.

**Katherine Jett:** Those are all the raised hands at this time. Do we have any questions in the chat?

**Keitra Hill:** Yes, Brionna, do we have any questions in the chat that have not been responded to as of yet?

**Brionna Hale:** I'm not sure someone answered this question. There was a question from Ann, "When assigning a Ticket, is it possible for the Portal to indicate if the Ticketholder will receive SGA?" Oh, was that already answered? I think that may have been answered, actually. I'm reading it.

**Alexis Thomas:** Hi, this is Alexis. Katie did respond to that.

**Keitra Hill:** Yep. Thank you so much, Katie.

**Katherine Jett:** We have a raised hand. It is Shada. Shada, you have access, if you press star 6 to unmute. And you have access.

**Shada Roper (SSA):** Okay. Thank you. We were being questioned about why the goals matter. We've had cases where an individual, we are reimbursing them for nursing school or because they wanted to be a nurse. That's what the initial thing said. However, now we're seeing that they have SGA based on a job that they have at Walmart. We also want to make sure that the job is related to something in the field that we are now reimbursing for.

**Keitra Hill:** Thank you, Shada for that information. I appreciate that.

**Shada Roper:** Thank you.

**Keitra Hill:** All right. I don't believe there are any other questions, maybe one came in. I guess Shada, this is a question in response to the information you just shared. What happens if it's not related? And, Katherine, could you unmute Shada for her to provide a response?

**Katherine Jett:** Yes, she's unmuted. Just press star 6 to unmute.

**Shada Roper:** So that's the purpose of you having an IPE or your case notes. We have to make sure that we are reimbursing for reasons that you said that were going to be the goal. That's part of the reason why we say we have to have amendments for anything that happens. When Renee said that we then would need to look at the amendments, we need to look at how the process began and when and how it changed, and what you're doing to facilitate this change or this occurrence. It can't just be that no longer were they actively trying to get this goal and now they're just, you know, get an SGA because they're getting SGA. They really need to make sure that they're meeting those goals because that's the purpose of the plan. You're supposed to be working with them towards complete self-sufficiency, in addition to the costs that we're reimbursing for. We have to make sure that they match the goals.

**Keitra Hill:** Thank you so much. And there are some comments in the chat that clients do change their mind regularly or they get SGA based on different employment. In that case, you know, you can add to this if you like SSA, please. But in that case, that is where the case notes are really valuable because you'll be putting those changes. And if there are any changes to employment that don't meet or are not specific to that goal, okay, what's the plan to, yes, they need to work right now but what's the plan to move them back to that goal? Or has that goal changed? So, that would be the information that you will be including in your case notes or progress notes that will be valuable in the process of us reviewing or SSA reviewing and determining if that claim can be paid.

Let's see. There is a question in the chat. "What if the VR case is still in progress but someone gets a job while in school?" Again, to the point of the case notes, that will be included in that. If let's say they're going to school to meet that goal, right, their short-term or long-term goal? However, in the interim, they're going to school, that information you would document within your case notes because that's making progress towards that goal. They're going to school for this field or that field that they said is their ultimate goal. You want to include all of those details within your case notes.

I see an item for the Portal wish list. Thank you for that. Yep, so a lot of the comments and things that you put into the chat, again, anything that's related to them finding employment, whether it be, as you say, school, going to school to reach that goal, any changes to employment based on what their particular needs are at the time, all that information you want to include within the case notes, but then you also want to include within the case notes how you're guiding them to either meet that goal or proceed forward to meet that goal or if something has changed, whether it's a new goal, how are you then proceeding to assist them to get to meet that goal?

So, let's see. I'm trying to follow along in the chat. Thank you for that comment, Eugenia. There are no limits as to how many times a person comes back to the VR for services. Thank you. Katherine, do we have any raised hands at this time?

**Katherine Jett:** No, ma'am. We are at time.

**Keitra Hill:** All right. I believe what I'm seeing now is just a few comments that you all are sharing amongst yourselves. Please, if you do have any questions that we have not responded to during today's call, we do ask that you send those to [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov). Let's see. Let me get back to the end.

Today's call, all the materials from today's call will be posted on the Your Ticket to Work website in the next few weeks, and that will be under the Events Archive section. That will include the transcript, the PowerPoint presentation, the recap, and the audio recording.

Looking ahead, our next All VR Call date will be Tuesday, October 8, 2024, from 1 p.m. to 2 p.m. Eastern. Please send All VR Call training suggestions so that will be any training or any information that you would like to be shared on these calls to the [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov). Please send those suggestions for the next call by August the 31st, 2024, for us to be able to prepare for our call in October. With that, on behalf of the Ticket Program Manager…

**Renee Clarke:** I'm sorry, I'm sorry, Keitra, can I just add really quickly?

**Keitra Hill:** Yes, Renee please do.

**Renee Clarke:** Thank you. I'd just like to thank Scott for coming on today and sharing information with us. We really appreciate your time.

**Keitra Hill:** Yes, absolutely. Thank you. And yes, to that point, Renee, if there are any questions for Scott based on the information he shared during the presentation, you can send those to the [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov) and we'll get those over to Scott and get a response back to you. Thank you so much for joining today's call. We will talk to you in October. Take care and have a great rest of your day.