QUARTERLY ALL VR CALL TRANSCRIPT OCTOBER 8, 2024

Keitra Hill (Moderator): Good afternoon, everyone, and thank you for joining the October All VR Call. This is our last call in 2024. My name is Keitra Hill, and I'm the TPM VR Payments Manager, and I will 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 is being recorded and transcribed.

Now let's go into our agenda. We're done with the welcome. Next, we'll go into logistics. After that, we'll have the Fiscal Year 25 Cost Formula and State Verification and Exchange System updates. Then we'll have VR Updates and Reminders, VR Helpline Reminders, then Communication and Outreach updates, and lastly, we'll have our Question and Answer session.

Next, for our logistics. This call is being recorded and transcribed. Post-call items will be available on the Your Ticket to Work website within the next few weeks. Participants are not permitted to record this meeting nor capture the transcript. During the Q&A session, if you're joining by phone and you wish to ask a question, 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 MS Teams application, you want to click on the raise hand icon, and the facilitator will provide access to audio to allow you to unmute your microphone.

One thing to mention is that on previous calls we have received duplicate questions via the chat and over the phone. For this call, the chat feature is not available.

Next slide. Please ask one question each time you are called upon by the facilitator. As always, any questions or comments that you have can be sent to VR.Helpdesk@ssa.gov and any questions that we do not answer during this live event will be forwarded to the appropriate panelists for comment.

Closed captioning is available for participants who join using the MS Teams application or utilizing the separate closed caption link provided. To turn on closed captions in Teams, go to More at the top of the MS Teams window and click Language and Speech. Next, select Turn on Live Captions. If using the link option, you want to paste the link into your browser, and it will open a separate window to view the closed caption options.

Next slide, please. Thank you. Now we will receive some updates for the FY25 Cost Formula and the SVES system from Raquel Donaldson, the Senior Program Analyst for the Vocational Rehabilitation Team with the Social Security Administration. Raquel, please go ahead.

Raquel Donaldson (SSA): Good afternoon, everyone. Thank you, Keitra. Just two quick reminders, the first one being in regard to our Fiscal Year 25 Cost Formula. I'm very excited that it is already out there to you all. If you have not seen, we did send an update in regard to when the deadline will be. The deadline has been moved to January 31, 2025. That sounds funny, but 2025 is the deadline. And as always, if you know you're going to run into some issues with that deadline, please send a quick email to me at raquel.l.donaldson@ssa.gov, and I will definitely follow up with you as soon as I can in regard to extending whatever time you need. I want to thank the few VRs that did reach out to me. Just pointing out the fact that some of your reports aren't due until the end of December, so it would pretty much be impossible for you all to submit your cost formula until you have that information completed. Thank you to everyone who did reach out to me. I appreciate it.

I also want to say, this is really, really important. Do not hold on to your claims. Even if you have not submitted your cost formula, do not hold onto the claims. Submit your claims as usual, especially if you know the claim will have or does have nine months of SGA, submit them. When the technician goes to process the claim, they will see that the cost formula is needed, and they will place it in diary for as long as it's needed. You will never receive a 620 denial just based on the simple fact that we're waiting for your cost formula to come in. Again, do not hold on to your claims. Submit any claims that you know you have the nine out of 12 months of SGA ready to go. If you have questions about that, please send an email to the VR.Helpdesk@ssa.gov and one of the analysts will respond to you as soon as possible.

A last thought or question or whatever it is, SVES. That is your State Verification and Exchange System, SSA's. It provides all of the authorized state partners with the standardized method of SSN verification, Title 2 and Title 16 benefit information, and uniform data response. If you are running into any issues in regard to your system, this SVES system, I just wanted to remind everyone that you do have what is called a Regional Data Exchange Coordinator (DEC). If you do not have this Coordinator's information, again, please reach out to the VR Helpdesk and we will provide you with that information. Everyone, every region, every VR has their own exchange based off of the region you're in. You have your own Coordinator that can answer questions that SSA is not able to, or that the VR Helpdesk is not able to answer.

These DECs, as we call them, work at Social Security. Again, if it's information that the VR Helpdesk could not answer, your DEC should be able to help you. That is all I have for today. I guess I'll talk to you all next year. Thank you so much. Turning it back over to Keitra.

Keitra Hill: Thank you for those updates on the FY25 Cost Formula and the SVES System, Raquel. Appreciate that. Next, we'll move into VR Updates and Reminders, and I'll be providing those. Next slide, please.

First, we have the GovDelivery Messages. The Social Security Administration communicates important information with service providers through the GovDelivery Messages, and that's including Ticket Portal issues and outages. As you can see to the right, on October 2, that Fiscal Year 2025 Cause Formula Due Date Extension notification was sent out via GovDelivery. Please save this email address to your safe senders list so that messages do not go into your spam or junk mail email boxes. That email address is tickettowork@subscriptions.ssa.gov.

Next, the Reconsideration Policy Change Reminder. We have a few reminders in regard to that. Social Security did announce on February 1, 2024, that VR agencies are only allowed to submit one reconsideration for the same VR period if the initial claim was denied due to earnings. If your reconsideration claim is denied with the codes below, you should not submit another reconsideration. We have denial code 200, which is Work Activity Could Not Be Established (No earnings or Not Verified). Then 210, Earnings Below SGA. 215, Earnings Below Blind SGA. 220, 8 Months or Less of SGA. 225, 8 Months or Less of Blind SGA. 320, 9 Months of SGA But Not Within a 12-month Period. 325, 9 Months of Blind SGA But Not Within a 12-month Period. And then lastly, 620, Untimely Filing.

Next, 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. Lastly, unless you have been given specific direction by SSA, VR agencies should submit all reconsiderations via the Ticket Portal and not via email to the VR Helpdesk.

Next, the Vocational Rehabilitation Client Earnings Report (VRCER) file. Just a few reminders. The file does go out once per quarter, and the next file will be going out in November. If you have any general questions regarding the VRCER file, please send those to the VR.Helpdesk@ssa.gov. In that email, you want to include your PID, your provider ID, in the subject line or the body of the email.

Next, for VR Directory Contacts and Ticket Portal users, you want to notify the VR Helpdesk of the following staff changes. That's changes to the contacts listed in the VR directory, or VR staff with access to the Ticket Portal that retire or leave your agency. With that, you want to send a request to remove the individual's access to the Portal. In that email, you want to include your PID in the subject line, and please remember to copy your Regional Coordinator. As Raquel mentioned, if you're not aware of who that is, you can send a notification or email to the VR Helpdesk to inquire.

That is all for VR Updates and Reminders. Next, I'll hand it over to Sharday Jenkins, the Provider Helpdesk and Document Manager with TPM, and she'll provide the VR Helpline Reminders.

Sharday Jenkins (TPM): Thank you. Next slide, please. Good afternoon. I'm going to be providing the VR Helpline Updates. First is the VR Helpline. Just a reminder, the VR Helpline is available from 9:00 a.m. to 5:00 p.m. Eastern Standard Time. The VRs may contact the VR Helpline at 1-866-949-3687, and you want to select option number 4 for assistance with the following inquiry types: Payment Status or request for status of VR payment submissions; Diary Status, diary reasons, and any additional actions and/or required documentation; Fax Documentation, receipt confirmation of fax payment documentation; Portal Access, assistance with Ticket Portal access; and assistance with Ticket Portal navigation. If you are receiving any Portal errors, these errors must be submitted via email.

Next slide, please. VR Email Inquiry Requirements. When submitting inquiries to the VR Helpdesk, please remember to provide the following information: your VR PID number, claim reference number, beneficiary's full name and Social Security number, and all relevant details. Reminder, the VR agencies are approved SSA secure partners; therefore, personally identifiable information may be sent between the state VR agencies and the Helpline without encryption.

Next slide, please. Employment Verification and Security Awareness Training. If you receive either of these announcements upon accessing the Ticket Portal, no action is required by you or your agency. You do not need to contact the Helpline. SSA will take the required actions to ensure that all updates are completed prior to you losing any access to the Ticket Portal. Thank you.

Rome Legacy Account Transition. All Portal users with accounts that were created prior to September 2021, you are required to transition your account to either LOGIN.gov or ID.me. If you get that notification, please take the required steps as soon as possible if you receive a request to convert your legacy account. Any accounts that have not been converted will eventually be deactivated and the option to sign in with the legacy account will be removed. Please do not ignore that message. Thank you, and I'll pass it over to Derek Shields.

Keitra Hill: Hi, this is Keitra. I want to introduce Derek Shields, the Senior Development and Training Manager with TPM, and he'll be providing the Communications and Outreach Updates. Derek Shields, please go ahead.

Derek Shields (TPM): Thank you, Keitra. Next slide, please. To start with our Communications and Outreach Updates, we wanted to share with you an update regarding our new email address. In late 2024, many Ticket program email addresses will be changing. I wanted to make sure that you're aware that support@choosework.ssa.gov email address will be changing to tickettowork@ssa.gov. As it says on the slide, we'll be sharing a GovDelivery message with this change and the other email address changes as soon as they become available.

Next slide. We are very pleased to announce that we have created several new videos. These materials in the video format will be published in late 2024, before the end of the year, and they are short videos promoting the Ticket Program and other work incentives, along with the services that are available through the program. The videos will be published on the Choose Work website and also on social media channels to include our YouTube channel. These titles include things like "Working While Receiving Disability Benefits", "Presenting Your Best Self to Employers", and "Meet Your Employment Team", along with others. We encourage you when these become available to share them as appropriate in your networks to increase awareness of the Ticket to Work Program. And today, we intend to share with you the overview of the Ticket to Work Program video, called "What is Ticket to Work?" And if we could go to the next slide, I believe our team has that ready to play.

Video Narration: Are you age 18 through 64? Do you receive Social Security Disability Insurance, or SSDI, or Supplemental Security Income, or SSI, because of your disability? SSDI provides benefits to people with disabilities who have worked or have previously worked and paid enough into the Social Security system through payroll deduction or paying self-employment taxes. SSI makes payments to people with disabilities and who have limited income and resources. Are you interested in increasing your earning potential and finding fulfillment in the workforce? If so, Social Security's Ticket to Work program may be a good fit for you. Ticket to Work is a free and voluntary program. The program can help you decide if working is right for you, and provides long-term support to help you find, keep, and advance in a job. Authorized Ticket Program Service Providers, such as Employment Networks or your State Vocational Rehabilitation Agency, provide services such as career counseling, vocational rehabilitation, job placement assistance, and training.

Employment Networks can help with career counseling and assistance with job placement, including helping you understand how working will affect your benefits. Vocational Rehabilitation Agencies work with people who need more significant services to return to work, or to work for the first time. This may include intensive training, benefits counseling, rehabilitation services, and education, which sometimes includes college courses. To learn more about other Social Security work incentives, see Social Security's Redbook by visiting ssa.gov/Redbook. If you're interested in participating in this free and voluntary program, call us at the Ticket to Work Helpline. Our team is happy to verify your eligibility and answer any questions you have. For more information, call the Ticket to Work Helpline at 1-866-968-7842. For TTY, it's 1-866-833-2967, Monday through Friday from 8 a.m. to 8 p.m. Eastern. Or visit us online at choosework.ssa.gov. For information on work incentives, visit Social Security's Redbook at ssa.gov/Redbook. Produced at U.S. taxpayer expense.

Derek Shields: Thank you so much. And just a note — I don't know if you noticed a couple of internet glitches in delivery along with the draft of the captioning. The final products have all that corrected, and they'll all be available on the Choose Work website and on our YouTube channel. And we look forward to sharing those in our channels and hopefully you'll agree to share them to help increase awareness as well. Thank you.

Let's move to the next slide now, please. Excellent. Now I wanted to talk to you briefly about three new success stories that we have that are available to you. The success stories starting here to include one covering Jeff. Jeff is a Marine veteran who had a motorcycle accident, and he kind of went off course in his career. But he had a mindset to improvise, adapt, and overcome, and utilizing the Ticket Program, which he was introduced to through his state VR program, it also supported and featured the County of Genesee American Job Center. And we're pleased that Jeff is now gainfully employed full time and has been working for a while. And as we prepare for Veterans Day next month, we'll be sure to be showcasing this success story.

On the next slide, we have our most recently published success story. This is about Kushal. This was just published. Kushal manages muscular dystrophy and has overcome a lot of challenges to keep his health care benefits as his career has progressed. You can learn more about how the Ticket to Work Program helped Kushal reach both educational and employment goals that helped him of course become financially independent. This success story features Full Circle Employment Services, his Employment Network.

On the next slide, we have another success story. This one is what we call a composite success story. And it focuses on three individuals that utilized volunteerism or community service in order to support their pathways to success. We pull from Hazel, Robert, and Jesus who turned their volunteer work into careers with the support of the Ticket to Work Program. This compilation story shares their stories and tips for others in how to seek and succeed through gaining experience through volunteering. If you are interested in sharing a success story, we'll share in just a moment where to send that request to.

Now, let's move to the next slide, please. As you know, we have Work Incentive Seminars Events, or WISE, webinars each month, and we promote these through our platforms, including GovDelivery. And we encourage all of you and your networks to join us for all of these on the fourth Wednesday of each month. The next WISE webinar, as it's listed here, is Ticket to Work: Supporting Access to Good Jobs for All. That Access to Good Jobs for All, of course, is National Disability Employment Awareness Month's theme this year. And that WISE webinar is on October 23 from 3 to 4 p.m. Eastern Time. We encourage you, again, to share this in your network to have folks come and learn, especially Social Security disability beneficiaries, about the services and supports that are available through both Employment Networks and your state VR programs. We can register for that at choosework.ssa.gov right on the home page there. And on the final slide for the Outreach team's update, I just wanted to provide some reminders. You can connect and share our social media on Facebook @ChooseWork or on X (formerly Twitter) @ChooseWorkSSA.

As I mentioned, if you have stories that you would like to bring forward as potential success stories for our team to publish, you can submit those leads to stories@choosework.ssa.gov. We do want to remind you to not include personally identifiable information when you're sending those story leads. Just provide very generic information and then our team will reach out to explore that further directly with you. And last, if you have blog ideas to submit, we always encourage you to do that. You can, again, email those to us at socialmedia@choosework.ssa.gov. And with that, those are the Communication and Outreach Team's updates, and I will pass this back to Keitra.

Keitra Hill: Thank you, Derek, for those Communication and Outreach updates. Now we'll move into our Question and Answer session.

Next slide, please. Again, the chat feature is disabled for this call. You will only be able to ask your questions aloud. Please raise your hand by dialing Star 5, and you will be unmuted by the facilitator, and then you want to press Star 6 to unmute yourself. Please state your first name only, your VR agency name, and ask your question. Katherine, I'll move to you. Do we have any raised hands at this time that would like to ask a question aloud?

Katherine Jett (TPM Logistics): Hi, yes, Keitra, we do. And Eugenia, you have access to your mic. If you'll click the microphone up top and unmute and ask your question.

Eugenia: Hi, this is Eugenia Cox. I'm with Oregon VR. I've been seeing quite a few incorrect denials, and we've been getting a lot of them. There's a lot of glitches in the Portal. Can somebody tell me when those glitches are going to be looked at?

Katherine Jett: Thank you, Eugenia. I'll defer to SSA.

Katie Striebinger (SSA): Hi, Eugenia. This is Katie. What glitch are you referring to?

Eugenia: Well, there's one glitch about — I just had one denied because they didn't have any benefits, when they clearly had benefits, and I had to repeatedly send in information on the proof that they had benefits. And that I was told that there was a glitch with the disability on a spouse. And there was also the glitches with regards to the diaries ending too soon.

Candice Whaley (SSA): Hi, Eugenia. I can talk to you about the one for the disabled spouse, since I was the one that caught that one. We had an issue with ITOPSS, our payment system, pulling the query for a disabled spouse from SSA's records. We had a release back in 2020, and it was fixed. We don't get too many of those, but we have found it. And we have contacted the systems analyst, and they need to have the developer look at it to fix it. I don't know when that will be fixed, but they are looking into that. Again, we don't know if there's an issue until it happens. You will have to continue contacting the VR Helpdesk so that we can look into it. And for the actual case now, I would say if you have a disabled spouse in the future, that you know that the beneficiary is receiving benefits on a disabled spouse record, please add that to the SVR Remarks. That way I can pull all those cases because they do need a manager override to process it.

Eugenia: This was an SSI case.

Candice Whaley: Yes, Title 16, SSI Disabled Spouse was not pulled from SSA's records onto ITOPSS, where we look at our queries. All of the information in SSA's records are pulled into ITOPSS, which is the actual software that we use to process payments. It pulls everything live and real-time. Unfortunately, Disabled Spouse is not pulling into the SSR record in ITOPSS for SSI. We have to do a bypass for the SSR record. And with that, I have to do a management override, but it is not working at this time. SSA Systems is aware of the issue, and a developer is looking into it. And we will let you know as soon as possible when that is fixed.

Eugenia: Okay, thank you.

Candice Whaley: You're welcome.

Katherine Jett: Thank you, Candice. Thank you, Eugenia. And we have another raised hand. Donna, you have access to your audio, if you'll unmute and ask your question, please.

Donna: Hi, this is Donna from Kentucky VR. I was trying to look at those denial codes that you had listed on the Reconsideration policy, and some of those looked like earnings-related denials. Can we look at those again?

Katherine Jett: Absolutely, we'll turn it over to Keitra. And if you'll go back, what slide was that, Keitra?

Keitra Hill: That I believe was Slide 7. I don't have the presentation up in front of me, my apologies.

Katherine Jett: Okay. It was Slide 8.

Keitra Hill: Slide 8. Rose, if you could go back to Slide 8, please. Thank you.

Donna: Those are saying they should not be submitted, but that would be, but they're earnings. Most of those are earnings related.

Raquel Donaldson: Hi Donna, this is Raquel. I had a feeling that this was going to be a question. I think it's because of how the second bullet says if your claim was denied with the codes below, you should not submit another reconsideration. I believe what Keitra was saying was, if you've already submitted a reconsideration and it was denied based off of these reasons, do not submit another one.

Keitra Hill: Correct. That's correct. And I didn't emphasize it the proper way. But yes, thank you, Raquel. That's correct.

Raquel Donaldson: Sure.

Donna: Okay. That was just a little confusing to me. Thanks for clarifying.

Raquel Donaldson: Thanks, Donna.

Katherine Jett: Thank you, Donna.

Keitra Hill: Yes, thank you for that question.

Katherine Jett: Thank you, Keitra. And we have another raised hand. Last number, 2888. You have access to your mic. You can press Star 6 to unmute.

David: Hi, this is David from Virginia. I just want to follow up on Donna's question. If we have submitted a reconsideration for earnings and we are showing wages, will you hold that reconsideration until your system catches up? Thank you.

Katherine Jett: Thank you.

Keitra Hill: I will refer that question to SSA, please. And again, that question was, would you hold a claim until the system catches up to showing those earnings in the system?

Katie Striebinger: This is Katie. I just want to make sure also that I'm hearing the question right from David. David, you're saying you got a denial for an earnings-related reason, and you submitted a reconsideration. Are you saying — are we going to hold your reconsideration until the earnings show up; or are you saying — I think I'm a little lost in the stats here — because we are giving you 365 days so that you can wait for the earnings to appear before you resubmit? I just want to make sure I'm hearing it correctly.

David: Right. We always have this lag between what we see and what you see. We've waited. We are putting in our reconsideration and showing maybe an additional quarter of wages, and that data you don't have yet. Are you going to hold that, knowing that we're saying we have it until this date to make sure before denying it again?

Katie Striebinger: No, we are not going to hold it. We want you to wait to submit it. That's why we're giving you 365 days. We want you to wait until you're sure it's there, and that's where we're hoping VRCER would help you out. Right, that you would see on VRCER that we have the same earnings that you have, and then you would submit a reconsideration.

David: Okay.

Katie Striebinger: If anybody else from SSA wants to jump in.

Raquel Donaldson: No, you're right, and just to piggyback off of that, hi, David. Also, remember that we have to have the earnings verified on our side. If it's something that you're submitting and let's say it has W-2s, things that, documentation that we know is verified, that's one thing. But if you're submitting, just like you said, you have an additional quarter of earnings that SSA does not have and that we have not sent out via VRCER, like Katie was saying, that's definitely something that you should hold on to, which is why we give the full 365 days for you to be able to submit a reconsideration based off of earnings.

Katherine Jett: David, you'll have to unmute. Press Star 6.

David: Thank you. That makes sense. I just wanted to clarify it for our internal process for this.

Katie Striebinger: You're welcome.

Katherine Jett: Thank you, Raquel. Thank you, David. And we'll go to the next raised hand. We have Eugenia. Eugenia, your mic is active. If you'll unmute to ask your question, please.

Eugenia: Hello, it's Eugenia Cox from Oregon VR again. When we're looking at the diaries and we have the due dates, we've been copying the diary and the submission showing that it went through okay. But I've been noticing on some of the diaries that after we have done everything that we were asked to do, they may have added something like, oh, well, we didn't get all the pages, even though we confirmed that it was received. Is there any way we can get some sort of a prompt? Because we're having to look at, re-looking at diaries that we think are complete. There's no prompt to show us that maybe now we just submitted the signature page of the plan. And then now, three days later, it's been selected for a PVR. Do we just have to keep looking at these diaries over and over, even though we think that they're completed?

Raquel Donaldson: Hey, it's Raquel. I'm sorry, Katherine, were you going to say something?

Katherine Jett: I was just going to defer it to you. Were you going to pass it on to me?

Raquel Donaldson: I was, yes, ma'am. Eugenia, it's based off of whatever the issue may be. It's a matter of you submit all the information, or so you think, and then the technician reviews the information. It may be that there's not a signed IPE, or like you were saying, you may on your side think that 20 pages went through. The technician goes to review it, and they're only seeing seven of the pages. The other 13 are blank or whatever the issue is. There's nothing that we can do on our end until the technician actually reviews the information. We don't have anything that's going to prompt us to say, hey, Oregon General, five of your pages are blank, until the technician takes the time to go through and review that information, which is why they're required to go back in and put another diary stating this is what's happening, this is what's missing. If it's a matter of there's no signed IPE or something like that, that will get denied because, and that might not be your example, but I'm just stating this for everyone on the call. If it's a matter of you submit an unsigned IPE, all IPEs are required to be signed. That is something that will get denied. Unfortunately, there's no way for us to prompt you before the technician actually has the time to go through and review what is faxed in.

Eugenia: If just for practice, once we submit it and think we have everything that we need, within a week or so you think they'll look at it so that we know that after we submit it, to keep looking for a specific amount of time? I know they've been processing them a whole lot quicker than they used to, so is there some sort of a process you think would work for us to recheck those, even though we think we're done with them?

Raquel Donaldson: I would, if it's something that still remains in diary, then I suggest just look, especially after a week or two, yes. Keep looking in the diary just to confirm that nothing additional has been placed in there as far as your comments. I'm sorry, not your comments, the technician's comments. Can I give you an exact date or daytime, you know, to look back? No. And I know, especially like with the larger VRs, it's even harder to continue to go back and look at that information. But it's the only way, other than if you're going to wait to receive another notice in the mail, because that will happen as well. Other than that, you do get the confirmation showing a fax has been received. But again, that's just saying that it was received on our end. We don't know exactly what we're looking at until a technician goes in and actually lays eyes on it.

Eugenia: Okay. So, I'm just to keep going in until it's actually processed through?

Raquel Donaldson: Don't drive yourself crazy, but kind of, sort of.

Candice Whaley: Hi, this is Candice. I just wanted to add a little something else, that the PVRs will not be denied until the 76th day. If you submit all the documentation that was required on the PowerPoint and that's in the VR Provider Handbook, then you shouldn't have to keep re-diarying the case for the additional information. If all the information is submitted the first time, that means proof of payment for the direct costs that you requested, authorization, warrant numbers, procurement numbers for authorizations, all of the required documents of PVR notice, case notes, signed IPE by both the counselor and the beneficiary, and all proof of payment. Again, we will keep diarying up until 75 days.

On the 76th day, the claim will be denied. Just remember, when you are submitting a claim, and this goes for all VRs, take a look at that PowerPoint that TPM went over for the VR Call back in May. All the information you need is there, as well as the VR Provider Handbook. If you're proactive, and you have all this information ahead of time, then your claim should not be denied. And if it is, that's when you send in a reconsideration and then we will follow up on that and see what we need. But if you have all the information that we request, there should be no reason why your case will be denied. Remember, this is just an audit. This is an audit that we have performed. We need all documentation because even though you were allowed the payment, we need validation of all the direct services that were provided. And know that the beneficiary was being assisted through, by you and the counselor at the time that they had filed a claim with the VR.

Eugenia: Yeah, and I'm not questioning the process or anything. I was just questioning the changing of the diary and how long we should possibly keep looking, just to get an idea of our process to try to just keep looking at it in case it changes.

Candice Whaley: Yes, you will have the notes in the Portal when it says diary. As Raquel said, keep looking at it to see if you have everything. But if you do submit everything that you need right off the bat, you won't have this issue. I just wanted to remind everybody of that. And thank you.

Eugenia: Thank you, Candice.

Candice Whaley: You're welcome.

Shada Roper (SSA): Hi, Eugenia. I'm not sure if you can hear me. This is Shada. You already state that you do your due diligence to do everything that you can. If you want to, within 40 days of the process, inform us that you have submitted everything , I'm just checking. We do follow up on those emails if you sent it to the Helpdesk, or you sent it to Raquel, or for those of us who work on special projects. If you've sent it to us and we go, hey, we needed this documentation, is it here? You can also follow up and say, I don't want to get to the point where I'm at the end point and I'm denied because I'm missing something. Is there anything that you can do? And that also is a part of our process because we are doing our best to try to make sure that you do get paid. This is cost reimbursement. We are trying our best to ensure the payment. If you send a message to the Helpdesk or those who are on special projects and we say, hey, we need this evidence, we're still missing this, you can alert us because we have a lot of claims coming in. And somebody from the Helpdesk will say, Okay, we'll get with the technician, or we'll investigate, just so that you're not at the end where it's like, oh, I got denied and I honestly believed I had done everything I should have.

Eugenia: Oh, yeah, the Helpdesk has always been very responsive. But I just want to know so I'm not just sending you over and over again, what's happened with this claim, what's happened with this claim. I just want to know if I need to keep checking because I did notice that sometimes it changes.

Shada Roper: Always check. Always check. We appreciate that, too. Always check, you know, as long as it's not 800 times. But if you say once or twice, a few weeks ago I did this, do you have everything? We would more than appreciate that, so we can do what we need to do on our end.

Eugenia: Yeah. Thank you.

Keitra Hill: Thank you so much, Raquel, Candice, and Shada for responding to that question. Katherine, I believe we do have another raised hand. Can you please announce who that is?

Katherine Jett: We sure do, Keitra. And we have Susan. Susan, you have access to your mic if you would unmute to ask a question.

Susan: Hello, my question is for Raquel. It's Susan from Massachusetts Blind. We recently had a case that we submitted, and it was denied. It was a client that we started his SGA in July of 2023, so mid-year. And it was denied for not providing wage documentation for a quarter. We wrote to the Helpdesk and asked if we could provide his W-2 from 2023, and we were told no. Raquel, you mentioned a few minutes ago the W-2, so is that acceptable documentation of earnings, the W-2?

Raquel Donaldson: Hi, Susan, yes, it is. And I actually remember this specific case. I think I remember it. But when you submit a W-2, I don't think it was a W-2. Maybe I'm getting you confused with another VR that I believe submitted pay stubs, not the full W-2s. I may be getting you confused and if that's the case if you could email me directly so I can look into that one. I think I'm getting yours confused with another one where they did submit pay stubs, but they didn't submit 9 out of 12 months of pay stubs. They submitted two pay stubs or three pay stubs. That's not going to give us what we need as far as to prove that this beneficiary had 9 out of 12 months of earnings or 3 out of 4 quarters of earnings. If you have a different situation than what I'm speaking of, if you would send me an email directly and I'll circle back with Sharday, who is the manager over the Helpdesk. And we'll both look into it and then follow up with you.

Susan: Your memory is perfect. We did submit pay stubs from July to December that would show earnings to date, and then we submitted some pay stubs in the beginning of 2024 to show those nine months. When it was denied because of quarters, the Helpdesk told us they couldn't look at year-to-date earnings. When we offered to do a W-2, we were told that it wasn't documentation. They didn't exactly say that. They sent us a list, and a W-2 wasn't on it. Because we didn't want to go back and bother this client for weekly pay stubs, we just thought if he can get us his W-2, we can go back to that client and do that to make sure that if it is an acceptable claim that we get the reconsideration for it.

Raquel Donaldson: Absolutely. You're spot on.

Susan: Thank you.

Raquel Donaldson: You're welcome.

Keitra Hill: Thank you for your question, Shada, and Raquel for your response. Do we have any other raised hands at this time, Katherine?

Katherine Jett: We have one more raised hand. We have Shelley. Shelley, you have access to your mic if you'll unmute and ask your question.

Shelley: Mine's not so much a question as maybe a suggestion. I'm looking at two different diaries, and I believe, because I didn't take an initial screenshot of them, but I believe there might be some secondary comment put in that maybe I need to look at a little deeper. Along with what Eugenia was talking about, do we have to keep going back and checking? Would it be possible for the technician to maybe put second, a two and second, or a secondary so that we can quickly look at it and say, oh there's an additional comment there. We need to pay a little more attention to that one. Rather than, I can see all my faxes have been sent in. I don't know if there's a secondary comment on here. Whether it be an asterisk and the next comment that's added when the technician puts something in; something that just jumps out for us that says, hey, there's an additional note here than what was previously put. Thanks.

Keitra Hill: Shelly, thank you for that comment question. I know that the technicians do, when they go in to enter a new comment, they do specifically identify what document still has not been received. That's kind of one way. And we do that fairly soon after you submit any additional faxes, because we do check that faxed date to see if something additional was submitted since the last time the case was put in diary. SSA, did you have anything you wanted to add to that in reference to Shelley's comment?

Raquel Donaldson: I do, Keitra, thank you. And just piggy backing off what Keitra said, when the technician initially puts the claim into diary, it's a more general statement placed as far as the comment is concerned. And what Keitra was saying is once they've reviewed that claim, if they see that there's one thing that may still be missing, when they go back and add the comment, they are being more specific about what they're still waiting for. That's a difference, Shelley, in regard to the first diary that's left with the comment, as opposed to any additional after that. That's just a FYI.

Shelley: Thank you. One in particular that I'm looking at is just as proof of payment for each direct cost item. And I believe my entire fax shows that on the authorizations with payments. I don't see something specific I need to follow up on. Is that one that would help contacting the Helpdesk to get some more clarification?

Raquel Donaldson: Yes, yeah, absolutely. Because it may be something that the technician missed or that you're missing, or basically you need more information, more detail, and the Helpdesk will be able to look at the claim and follow up with you on exactly what the technician is still in need of.

Shelley: Thank you.

Shada Roper: And Shelley, this is Shada. I'm going to agree with Raquel. Like we said, no, if Eugenia, you know, emails us one or two times and says, hey, I did all I was supposed to do, is there anything else? We prefer that, because then we say, oh, this is what's happening, because we know we have special claims and PVRs and all kinds of things. And then we say, you gave us everything, but you missed the IEP, or you gave us the approvals, but where is the agreement for this plan? Like, we need something else. And we'll say that if you send a message to us, and not wait until it gets to the 45th day. If you do it on the 35th or the 40th day, and say, hey, I just rechecked, I made myself a note. I rechecked. I did all I was supposed to do. Can you see what I'm missing on my end because it looks like I'm complete. Is there anything else you need? Then we will get back to you within 24 to 48 hours to say, hey, we need more information or something before you get to the point where you're denied or where you're just like, I don't know what else I'm missing. I clearly did what I was supposed to do.

Keitra Hill: Thank you for that. We do have another raised hand; I believe it's Cassiopeia. Katherine, can you go ahead and unmute her so she can answer the question?

Katherine Jett: Yes. Cassiopeia, you're unmuted. You can unmute yourself to ask your question.

Cassie: Hey, I go by Cassie unless I'm in trouble, and I am from Washington VR. On that last question, let's say something is added to the request. Do we get, just because I'm pretty new at this, would I have to ask for a new fax cover sheet, or will there be an updated one in the system, and I need to refax the whole packet? How is the best way to proceed with that?

Katie Striebinger: Hi, you definitely don't need to refax everything. You do need to create a new fax cover sheet, and then whatever the technician is requesting specifically, that's all you need to fax. Do not do double the work by going back in and refaxing everything if they're not asking for everything.

Cassie: Okay, great. Thank you.

Katie Striebinger: You're welcome.

Keitra Hill: All right. We have a few more moments before the call is ending, so we are going to conclude the Question and Answer session for today. But certainly, if you have any additional questions, you can send those to the VR.Helpdesk@ssa.gov. Rose, if you could go down to, I believe, the second to last slide. Thank you.

Our next call will be on January 14, 2025. The first call of the New Year, from 1 p.m. to 2 p.m., Eastern Standard Time and that will be via Teams.

Please send All VR Call training suggestions to the VR Helpdesk, and please send those suggestions by December the 13, 2024, and we will try to add that into the slide. That's why we ask for it so far in advance if we need to get, say, an additional speaker from SSA to provide any updates or any training to you all, we can have that time to do that.

Thank you all for joining today's call on behalf of SSA and TPM. You all have a great rest of your day. Take care. This call has concluded.