QUARTERLY ALL VR CALL TRANSCRIPT JANUARY 14, 2025

Keitra Hill (Moderator): Good day, everyone, and Happy New Year. Thank you all for joining the first Quarterly All VR Call for 2025. Let me get my camera on to greet you properly. All right. My name is Keitra Hill. I am the TPM VR Payments Manager, and I will serve as the moderator for today's call. Before we begin our agenda and presentation, I would like to advise you that this call is scheduled for 60 minutes, and it will be recorded and transcribed. So now to our next slide.

Here we have the agenda for today's call. I've provided the Welcome. Next, I'll go into the logistics for today's call. Next, there will be a few announcements. We will have the Section 301 Overview, which will be followed by a brief question and answer session regarding that topic. Next, we'll give some information about the Fiscal Year 25 Cost Formula, as well as the Vocational Rehabilitation Client Earnings Report (VRCER) File Tips. We did have that VRCER training, and we will go over a few tips from that training. Next, we have the Prepayment Validation Review documentation, just to go over that and reiterate the documentation that's required and how you should submit it. Next, there will be a 2024 Year in Review. And then lastly, we'll have our final question and answer session. Next slide.

Here we have our logistics. This call, again, 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. Links shared during this live event will be posted in the Q&A window. During the Q&A sessions, chat is not available to post any questions, so you must ask your question aloud. If you are joining via phone and you wish to ask a question, you'll raise your hand utilizing star 5, and you will be unmuted by the facilitator. Then you'll press star 6 to unmute yourself. Next, if you're joining via the MS Teams app, you want to click on the raise hand icon in the top of the window, and the facilitator will then provide you with access to your audio to allow you to unmute your microphone.

Next, please ask one question at a time when you are called upon by the facilitator. Any additional questions or comments can be sent to the VR.Helpdesk@ssa.gov. Those questions that are not answered during this live event will be forwarded to the appropriate panelists for comment. Lastly, we have our closed captioning. It is available for participants who are joining via the MS Teams application or if you want to utilize the separate closed caption link that will be posted into the Q&A window. To turn on the closed caption in Teams, you want to go to **More** at the top of the MS Teams window, click **Language and Speech**, and next select **Turn On Live Captions**. When using the link option, you can paste the link into your browser, and it will open a separate window to view the closed captions.

Next, we will get started with a few announcements. First, we have the new Ticket to Work email address. On December 2, Social Security announced, and that was 2024, Social Security announced via GovDelivery message that the Ticket Program email address has changed. The support@choosework.ssa.gov is now tickettowork@ssa.gov . This email address is for Ticketholders and the general public who would like to contact us for more information about the Ticket to Work Program. Please be sure to update your website content with this new email address. For a limited time, emails sent to the Support@choosework.ssa.gov email address will be forwarded to the new TicketToWork@ssa.gov address.

Next, the Cost Reimbursement and Ticket to Work Training Symposium. This will be hosted by state VR agencies. The dates are March 4 through the 6. The location will be at the Anne Arundel County Career Center in Linthicum, Maryland. There's no cost to register, and here is the link to register, and this will be posted into the Q&A window. So next, oh, actually, can you go back one slide, please? Eric Schmidt from the Maryland Division of Rehabilitation Services would like to say a few words regarding this symposium. Eric, if you could go ahead and unmute and share your thoughts.

Eric Schmidt (MD VR): Hi, Keitra. Can you hear me, okay?

Keitra Hill: Yes.

Eric Schmidt: Okay, great. Yeah, so just very briefly, folks who've been around a little while, this is very similar in layout to the CSAVR, which used to have a spring session in Bethesda, Maryland. They had a breakout room that allowed us a chance to do a couple of days of training on Cost Reimbursement and topics related to Cost Reimbursement, most particularly Ticket to Work, Partnership Plus, sometimes things on benefits planning, data for your agencies. We're looking to recreate that, and luckily for us, we had a partner here in Maryland that's gracious enough to host us. We currently have about a little over 60 attendees registered, and the breakdown right now is pretty evenly split between blind agencies, general agencies, and combined agencies. We've got about 15 to 20 subject matter experts, including Social Security, who will be sharing some information with us on the first day. And then we've got folks from VR agencies, Employment Networks, some vendors of benefits planning services are gracious enough to join us and provide you with some training.

I would say if there's any questions about that, you can certainly go ahead and reach out to me, but the registration, again, is free. We tried to facilitate this in a way that the venue is very near Baltimore Washington International Airport. A lot of the hotels offer free shuttles both to the airport and then also to the venue itself. They offer a two- to three-mile radius to try and find ways to get you here if possible, and if you're interested, and as cheap and cost-efficiently as possible, because I know there's a lot of issues with travel. I have had a number of folks asking if this is going to be presented live. That's not something that I believe we're going to be capable of doing. I'm looking at ways to try to record some of the information. I'm not sure we're going to be able to do that yet.

I will say we can certainly try to share the materials that we put together for everybody and we can make sure we get that to you all on a future call. But yeah, I just wanted to offer it out there. If you have questions, please reach out to me directly. If it's okay, I can just give you my email address. Keitra, is that okay to just announce that? Sorry, you're on mute if you're responding.

Keitra Hill: And I am on mute. Sorry about that, Eric. Yeah, we can also, if you have any additional information, we can offer the VR Helpdesk as well, Eric, and we can forward that over to you if you like.

Eric Schmidt: Okay. Sure, that'd be fine. So yeah, just basically, if you're unsure or you want to make sure that it's appropriate for you, you can always reach out to me. I'm happy to field those questions. We do have a hard limit of a maximum of 90 attendees due to the space and the room that we're using. If you're interested, go ahead and register. When you do register, you will also receive an email response that you have registered, and it will provide a list of the hotels in the area and the amenities that they offer. That way, you can make a choice to get registered in the hotel. We don't have a room block in the hotels. That's the last piece of information I wanted to share. I can't hold the hotels with our state credit card for this. It's basically some logistical information, so you can go ahead and register at the hotel. That's everything I wanted to share, Keitra. Thank you.

Keitra Hill: Thank you so much, Eric. Thank you for that. And I'm so grateful to you and SSA for being able to host such an event, because as you said, at the CSAVR Conference, you used to have that breakout. This is a small subset of that. Thank you very much for being part of the organizers for this event. Much appreciated.

All right. Next, we will have the Section 301 overview provided by Renee Clark. I mean, sorry, Renee Moore, I keep confusing the two, from the Office of Employment Support Policy with the Social Security Administration. Renee Moore, if you could please go ahead. Thank you.

Renee Moore (SSA): Hi Keitra. I often confuse Renee and I, too. Hello, everyone, and thank you for lending me your ear for a few minutes today. My name is Renee Moore with the Office of Employment Support, and I'm going to share with you information about Section 301. Section 301 is one of our little-known continued payment policies for those disability and SSI beneficiaries whose disability or blindness has ended for medical reasons. Next slide, please.

I'm going to give you a little background as far as eligibility requirements. For SSI or SSDI benefits to continue after a medical cessation or when a beneficiary does not meet the adult requirements for disability benefits, if the following requirements are met. The individual participates in an appropriate program of VR services, employment services, or other support services. The individual began participating in the program before the month their disability or blindness ceased. If the beneficiary stopped participating prior to the month of cessation, in the month of cessation, or during the month after the medical cessation, there is no potential 301 eligibility. And I'll give you a quick example just for clarity.

If we determine, for example, that the individual is no longer medically disabled as of, let's say, May 2025, in order for them to be eligible for continued payments under Section 301, the individual must be participating in the program no later than April 2025. And I need to make a correction to this bullet. We gave a policy reference of GN-14510.003, Subsection E. That should be DI-14510.003. I apologize for that. I didn't catch it before now. So that's DI-14510.003, Subsection E, is where you can find this information. The next eligibility requirement, the individual's participation in the program continues through the two-month grace period after cessation. And I'll tell you a little bit more about the grace period.

To elaborate on that, when we determine that an individual is no longer medically disabled, the cessation date is the determination date. Here's a quick example using the same May 2025 from the last example. If we make a determination in May 2025, that individual is no longer medically disabled effective May 2025. However, we will continue to pay the individual for the months of May, June, and July; June and July being those grace period months. After July, we cease disability or SSI payments. The individual's participation in the program – oh, I'm sorry, bullet four. We determine on the last one, sorry, we determine that the individual's completion of the program or continuation in the program will increase the likelihood that the individual will no longer return to the disability rolls. And that's what we call a likelihood determination. Next slide, please.

You heard me mention an appropriate program on the last slide. The individual must be participating in, quote, an appropriate program. Well, what does that mean? Well, here's a list or just a couple of examples. It's not all inclusive. But what we consider to be an appropriate program is an Individualized Education Plan or IEP, State Vocational Rehabilitation (VR) Agencies, Employment Networks (EN), participation in a Plan to Achieve Self-Support or PASS, an Individual Work Plan or IWP, or an Individualized Plan for Employment or IPE under our Ticket to Work Program. Next slide, please.

When does entitlement end? Well, we continue to pay the individual until the individual completes the program, for example, if they graduated, or bullet two, the individual stops participating in the program. For example, they stop showing up for class. Or bullet three, we determine that continued participation in the program will no longer increase the likelihood that the individual will not return to the disability roles. That's that likelihood determination again. Benefits terminate effective the month after the month of program completion or participation stopped. I'll say that again. Benefits terminate effective the month after the month of program completion or participation stopped. For example, if the individual graduates or just stopped going to class in June of 2025, we will terminate their benefits effective July 2025. Next slide, please.

When do we flag Section 301 cases? And before automation, it was literally a flag put on the paper folder, but now everything is digital. But we flag Section 301 cases during our Medical Continuing Disability Review, or we call that CDR for short, or an age 18 Redetermination. We ask the beneficiary whether or not they're participating in vocational rehabilitation, employment, or other support services. If the beneficiary indicates that they are, we mark the case with a potential Section 301 case flag. And that's for us to develop for participation if there is a medical cessation. If the determination is a continuance, meaning we find that their medical disability still entitles them to payment, then we do not develop Section 301. The individual will continue to be paid under our regular disability benefit guidelines. However, if we find the individual is no longer medically disabled, that is when they become eligible for payment under our Section 301 rules, right? The case will have a Section 301 flag, and we will develop for that entitlement.

Now at this point, you're probably wondering why a VR would need to know about Section 301, right? Well, for one, the more organizations and agencies that assist our beneficiaries are aware of this policy, the better. More importantly, it's because we'd like to ask for your help. In the opening, when I talked about Section 301, I referred to it as little known. And that's because a lot of our beneficiaries don't know that this policy exists. And so, as a result, they sometimes skip over the questions that help us determine their eligibility. Questions like the ones I'm about to tell you about when we reach the next slide. So, let's look at how you can help. Next slide, please.

Part of the CDR process, the Continuing Disability Review, is for the beneficiary to complete the Form SSA-454. Section 7 of the 454, which I've captured here on the screen for you, asks if the beneficiary is participating in any educational, specialized work, or VR training, or similar. You can help by ensuring this part of the form is completed. It's important because these questions prompt us to flag the case for Section 301 development. If you look at the highlights here, this is Section 7. Question 7A asks if they've attended any educational programs. Question 7B asks if they received any type of training at all. And that's because if they received some type of training or education, it could make them eligible for continued payments after a medical cessation. It's very important that they complete Section 7 of this form if they're participating in any way, and a lot of them skip over it. This is one way that you can help. You can make sure that they complete Section 7. Another way that you can help is you can consider asking them questions about the beneficiary's medical review status as part of your discussions with them. And here's what I mean by that. Next slide, please.

During your discussions with your clients, you can ask questions like whether or not they're going through a medical review. If they are, you can share with them that there is important information about educational and vocational training needed on that SSA 454. And please consider offering to help them complete it if you can. If they are not currently going through a medical review, then you can ask them to let you know when they start the medical review process. We send them notices in advance to let them know that they're coming up on a medical review. And they can let you know when they start the medical review process. And hopefully, if time permits, you can help them complete Section 7 of the SSA-454 thoroughly and correctly. Next slide, please.

Development after medical cessation. Here are the circumstances under which we do or do not develop after a medical cessation. If the individual appeals the decision, which means we medically cease them, and they say, "Well, wait a minute, my disability is continuing. I'd like to request an appeal of that decision." And when they appeal, they can request what we call Statutory Benefit Continuation, or SBC. That is another one of our continued payment policies, right? Well, if they request SBC, they will continue to be paid, in which case we will not pursue verification of vocational rehab participation during the appeal process.

If they appeal but do not request SBC, Statutory Benefit Continuation, then we will contact the Vocational Rehabilitation service provider listed on the medical review forms and collect information about their program participation on our form SSA-4290. And the 4290 is our vocational rehabilitation or similar development form. It's where we document their participation and all that good stuff.

We will send the case to another office to determine if the program meets the requirements and if participation will increase the likelihood of permanent removals from the role. So that's that likelihood determination that I mentioned earlier.

SSA will inform the individual of the decision. If it's an approval, the individual will continue to receive benefits if they meet the non-medical requirements for payment. Next slide, please. So, if you'd like more information about our Section 301, if you want to read a little more about it, it is available on our ssa.gov website. The what we call PROMS reference or policy reference is DI-14500. That will take you to the table of contents for all the Vocational Rehabilitation, Section 301's policies, eligibility, when entitlement begins and ends, and all of that good stuff. And with that, I'll turn it back over to Keitra.

Keitra Hill: Thank you so much, Renee. Thank you for all that important information about Section 301, how they can assess beneficiaries and through that process. Thank you so much.

At this time, we'll actually move into our first Q&A session specifically on this topic. If you would like to ask a question, please remember to, if you're on the phone, raise your hand by dialing star 5. You'll be unmuted by the facilitator. Then you'll want to press star 6 to unmute yourself. If you're on the MS Teams app, you can raise your hand by selecting the raise hand icon in Teams, and your mic will be unmuted by the facilitator. Then you'll unmute yourself. Please do state your first name only, the name of your VR, and ask your question. Emani, do we have any raised hands at this time?

Emani (TPM Logistics): Hi Keitra. Yes, we do have one raised hand from Shelley. You can unmute yourself and ask your question.

Shelley Paquette: Hi. It's Shelley Paquette from Minnesota VR. I had my first ever 301 Claim that came through. I got the notification in my email, and I was just a little confused. The letter didn't really clearly define what I needed to send back. So, there was a little back and forth with the person on the email. Just a suggestion that if there's certain things that I need to return, and the process of either sending it via email or putting it into the portal, and then what button to select for the barcode in the portal. Mine's still sitting and waiting for a decision, so I'm hoping I did it all correctly, but just a suggestion for a little more clarity in that letter of the process.

Keitra Hill: Shelley, thank you so much for that suggestion. We haven't had a lot of experience with talking with the VRs about Section 301. We really appreciate information like that, that we can carry back, that can maybe smooth out the process for the beneficiary as well as for you guys. Thank you so much for that.

Shelley Paquette: Not a problem. I do have another question, too, then. If we can identify someone who most likely would have qualified for a 301 situation, is that something that can be looked at retroactively?

Renee Moore: What do you mean by retroactively? Well, I'll let you explain. What do you mean by retroactively?

Shelley Paquette: Basically, they've gone through the process. Their benefits have stopped, but they're participating still with us. And we think, oh, your benefits stopped because they determined you're not medically eligible, but would you have been eligible if you would have been able to have a 301 status?

Renee Moore: Yeah, gotcha. If they were participating in that program before they were no longer medically eligible, yes, you can tell them to contact our 1-800 number and let them know whether they are or were participating in a program during the eligibility period, in which case we will begin development for Section 301. Absolutely.

Shelley Paquette: Thank you.

Keitra Hill: Thank you.

Renee Clarke (SSA): Hi, this is Renee Clark. Can I jump in really quickly? Shelley, are you still there?

Shelley Paquette: Yep, I'm here.

Renee Clarke (SSA): If you have questions regarding the specific 301 letter that you got and want to know whether or not we received the information that you submitted, please email the help desk and we can respond.

Shelley Paquette: I have. I haven't heard back if I did it correctly. That was my last exchange with them. That was probably a week ago.

Renee Clarke: Okay. Thank you.

Shada (SSA): Also, I'm sorry. This is Shada. I'm the one that the 301s come to.

Shelley Paquette: Yes.

Shada: ODO (Office of Disability Operations) sends the information, and they send it to a specific 301 mailbox. And so, in the email it says, return when you're filing the claim. Two, there's a 4290 that's sent to you in addition to the letter. Upload it to your claim as well once you've filed your 301 Claim. And then there was also a slide where a VR did a presentation on how it goes in the portal. We don't see what you see in the portal.

Shelley Paquette: No, I understand that. I understand that. I think it was just a little confusing because now it sounds like I was supposed to submit some information for the claim and then submit something following that. Am I hearing that correctly?

Shada: No, just the claim.

Shelley Paquette: Okay.

Shada: With the letter that you received, that's why it says just these attached documents. The letter that you received and that 4290. The letter says, hey, state, you have a potential 301 for payment.

Shelley Paquette: Right.

Shada: And then there's a 4290 identifying who that claimant is, that is a possible 301. Once you submit the claim, it comes back to us and it's in a claim processing queue for our 301 claims. But it'll have that information attached, in case later on it said, why was this processed as a 301 claim and not a Cost Reimbursement claim? Because this is what happened, and this is what was received from the Office of Disability Operations in the field office. So that's where we found that information. So that's it. There's nothing more to it.

Shelley Paquette: Okay, thank you.

Shada: You're welcome.

Keitra Hill: Thank you, Shelley. And thank you, everyone, for providing some insight into that. At this time, Emani, do we have any other raised hands?

Emani: Hey, Keitra. No raised hands at this time.

Keitra Hill: All right. With that, of course, we do have a final Q&A session. If you think of something as we move on, please do ask questions at the final Q&A. Now we will move on to our next topic, which will be the Fiscal Year Cost Formula, the FY25 Cost Formula and the VRCER File Tips.

First, just a reminder about the Fiscal Year 25 Cost Formula. Next slide, please. The due date extension. On October 2, Social Security Administration announced via GovDelivery message, which is shown to the right, that the due date for submitting your ACP (Administrative, Counseling and Placement) data was extended to Friday, January 31, 2025. If you need any additional extension, please email Raquel.Donaldson@SSA.gov. You want to continue to submit your claims as usual. Do not hold claims because you have not submitted for the cost formula. Those claims will be placed in diary until we have received your cost formula and it's been accepted. If you have any questions, please do send an email to the VR.helpdesk@SSA.gov.

Next, the VRCER File Tips. This is from the training. VRs have the option to customize their VRCER file. Instead of having SSA send every record, consider having SSA send a smaller file with only relevant clients, such as removing clients without earnings or remove clients who do not have earnings at the D, E, or F level, and those levels are shown here to the right. Consider sending in by fax quarterly earnings for cases where SSA does not have the third quarter on record. Also, VRs are strongly encouraged to use VRCER as the case note for any claim where VRCER file was used to determine earnings. SSA uses this tag to track the VRCER cases submitted. To request any changes to the file, contact VR.helpdesk@ssa.gov.

Next, for the 2024 Year in Review. First, we have our VR Payment Statistics. Next slide, please. That's 2023 versus 2024. Receipts for Fiscal Year 23, we had over 31,000. For Fiscal Year 24, we had over 25,000. For payments for Fiscal Year 23, we had over $201,000 in payments. For 2024, there were over $189,000 in payments. And then lastly, for our claims processed. In 2023, we processed over 37,000 claims, and in 2024 over 36,000.

Next, for 2024, we have our top three payment denials, and these are in order by the number of denials received for each of these codes. So first we have the 620, which is untimely filing. We had over 3,000 denials in that area. For 220, which is eight months or less of SGA, over 2,000 denials. For 320, that's nine months of SGA, but not within a 12-month period, we had over 1,600 denials.

Next, just to reiterate those denials, specifically the reasons, the description and a tip to avoid that type of denial. First, we have 220. Again, this is eight months or less of SGA. To describe that, that's eight months of less of verified SGA level earnings were found in SSA's records. A tip to avoid this type of denial 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 the 320 denial and we'll be going over a few tips in reference to this one. This is nine months of SGA, but within a 12-month period. That means that 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 to avoid this denial is to check the quarterly wage information to determine if nine months are found within 12 months of SGA level earnings identified. If not, SBRA must provide verifiable documentation of nine months within 12 months of SGA level earnings. Our second tip for these 320 denials 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 denial.

Next, we have the 620 denial, and we have a few different options here as far as what type of claim it is. First, we have the untimely filing for an initial claim. The initial claim was filed more than one year from the last month of SGA. The tip is to review the earnings provided on the VRCER, to ensure you file the claim no more than one year from the last month of SGA.

For the 620 denial, we have the untimely filing for earnings reconsideration. Here, the reconsideration claim for an earnings denial was filed more than one year from the decision date. The tip here is to review the notice of determination from the initial claim to ensure you file the reconsideration no more than one year after, or from rather, the decision date.

Next, untimely filing for non-earnings reconsideration. The non-earnings reconsideration claim was filed more than 60 days from the decision date. The tip here is to review the 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 the Prepayment Validation Review documentation. So first, just to review the required documentation. First, we have the PVR notice. The SSA-199 with cost in numerical order. Third, proof of payment for requested services. Fourth, the signed Individual Plan for Employment or amended IPEs. And then lastly, case or progress notes. So just to go through a few examples of those.

First, we have the PVR notice. Previously, we did mention that if you are ready to submit all the other required documentation and you have not received this notice, you can reach out to the VR.Helpdesk@ssa.gov to receive a copy. Again, you can submit all the documentation at one time.

Next, we have the first page of the SSA-199. Of course, you'll complete this, making sure that you indicate the total cost you are requesting. Next, we have the second page of the SSA-199 where you'll provide the breakdown of direct cost in numerical order and the total direct cost requested. One thing to mention here in this example is numbered. We ask that you do the same on the form that you are submitting, as well as the documentation that precedes this document matches in this numerical order. And it is numbered so we can quickly connect the cost of services to the document you submitted for that.

Next, I will talk about proof of payment documentation. So here are some examples. That will be copies of all direct costs, including date of service, type of service rendered, cost of service and proof of payment. Also, copies of bills, checks or credit card and an EFT transaction. Also, receipts under the vendor's letterhead with a paid stamp, date stamp and signature. And then lastly, authorizations and invoices with warrants or procurement numbers.

Next, we want to show a few examples of documents that we've received. Most of them are generic, so your documentation may not look the same. I do want to point that out. But these are just a few examples. So here we have proof of payment. Number one, this indicates the authorization number, that the total outstanding amount is zero, the payment action is final and that the payment amount was $105. Our next example of proof of payment shows the authorization number, the payment amount, and it also includes the warrant number and date. And one thing to note is that this has the eight and nine. So, make sure that it is numbered to align with the SSA-199.

Next, we have an example of an Individual Plan for Employment. Again, this is a generic document. But in this document and all IPEs, you want to make sure that you have an employment goal or outcome. And then you want to make sure that the services you provide align with the goal that you indicate in this IPE. Of course, if the goal changes over time, you can complete an amended IPE. And then the services following that will reflect that goal. So next, we have the signed IPE. This is the last page of the IPE where you as a counselor will sign, as well as a beneficiary will sign. You want to make sure both of those signatures are there. There was a notification sent out regarding how an electronic signature would be with the actual date block. We have seen a few other examples of that. If it's been approved by SSA for you to submit it in the vein that you do, please continue to send it in that vein. If you have any questions regarding the signature block, please email the VR.Helpdesk@ssa.gov.

Next, we have a generic example of case notes. Yours definitely can look different. But this is generic, showing the dates of services, dates that you've provided services, and any summary of that discussion during that date and time. So that would be case notes. And then next, we have an example of an invoice. Submitting an invoice for cost. This particular example provides the authorization number, as well as the total billed amount, because those are the two most important things that we need to see on that invoice.

Next, we also have another example where it lists the authorization number, the cost breakdown, as well as the total outstanding amount. And this document will connect with the proof of payment that you send for this same cost item. Next, we have the purchase authorization example. This example includes the purchase authorization number, the procurement number, beginning and end date of services provided, and the total cost.

Lastly, as far as reminders, you do want to ensure that the VR services and costs meet the requirements for the requested payment. And for more information regarding PVR documentation, you can refer to the VR Provider Handbook on page 41.

With that, we are now in our final question and answer session. Again, if you are over the phone, you want to raise your hand by dialing star 5 and you'll be unmuted by the facilitator. Next slide, please. Then press star 6 to unmute yourself. If you're on MS Teams, you want to raise your hand by selecting the raise hand icon in Teams, and your mic will be unmuted by the facilitator. Then you can unmute yourself. Again, please state your first name only, your VR name, and ask your question. Emani, do we have any raised hands at this time?

Emani: Hi, Keitra. Yes, we do. Give me one second and let me get it in order. Okay, starting with number one, we have Timothy Kelly. You can unmute yourself and ask your question.

Timothy Kelly: Hi there, can you hear me?

Keitra Hill: Yes.

Timothy Kelly: Oh, hi. My question is just regarding the feedback in terms of when diaries are denied. Would there ever be a possibility to get direct feedback in terms of what specifically was missing, or if there was just an error, or even if something was scanned but it was not legible? Is there a possibility of getting something that directs why it was denied or is still in process?

Keitra Hill: So as the claims are processed throughout the month and we place them in diary, and go back periodically to see if additional information was faxed in. And at that time, if we still don't have what we need, we will specify within the comments. Let's just say, for instance, if it's a PVR case and you have all those documents required and you're missing a signed IPE, we would specify that this document is what's missing. Initially, when a PVR is placed into diary, it simply says it's selected for diary. Please submit all these documents. We will go back over about a week or so, to see what has been submitted. If any of those specific documents haven't been submitted, we would indicate that in the comments. So, we don't send out emails directly to you that it's missing, but we will put it in the comments once we re-diary, after we've reviewed the documentation you submitted.

Timothy Kelly: Okay. Understood. It is in the comments then. Okay.

Keitra Hill: Yep. Absolutely. And if there's any question, if you don't see the specific information, you are looking for, you can email the VR.Helpdesk@ssa.gov.

Timothy Kelly: That's perfect. That was my next question because sometimes it seems a little ambiguous in terms of what I've seen. Okay. Great.

Keitra Hill: Thank you.

Raquel Donaldson (SSA): I'm sorry. This is Raquel.

Keitra Hill: Yes.

Raquel Donaldson: While I still have Tim. Tim, are you asking about once the invoice is diarized, you submit information, and then it ends up being denied? Are you asking if there's somewhere where you can find out why it was actually denied after you submitted the information, or what Keitra said was good enough? I'm just trying to figure it out.

Timothy Kelly: Sure. I would say the latter. I would say once it's denied, then can we find out why it was denied.

Raquel Donaldson: Sometimes when they deny it, there may be a comment on there, but I'm not sure. Katie, are you on the line? I'm not sure if the VR is able to see once it's denied the final comment that's placed on the claim in the portal. Are they able to see that?

Katie Striebinger (SSA): They see the reason. So, if they need more specific details, that's when they would reach out to the VR Helpdesk.

Raquel Donaldson: Gotcha. Okay. Thanks, Katie Striebinger. There you go, Tim. So, if it's something that you want specifically to find out, hey, I submitted this, but I still got denied, then do what you've been doing now, which is reaching out to the VR helpdesk, and the analyst there will definitely follow up with you.

Timothy Kelly: That's perfect. Thank you, guys.

Raquel Donaldson: You're welcome.

Keitra Hill: Thank you. Emani, who do we have our next question from?

Emani: Yes, the next question is from Donna. Donna, you can unmute yourself and ask your question. Hi Donna. If you want to go ahead and unmute yourself and ask your question.

Donna: Sorry about that. It took me a while to find the unmute button. In regard to the PVR documentation, is there any particular order that you want that submitted in?

Keitra Hill: There is not necessarily a particular order that we want to submit it in. However, when we're speaking of the SSA-199 and placing that in numerical order, we would ask that you place the documentation behind that in that same order. So, you know, the cost, the proof, you know, and then the cost and the proof. So, as you go line by line, if you could put that in order. Yep.

Donna: Okay, sure.

Keitra Hill: Thank you. All right. Emani, who do we have next?

Emani: Yes, we have Eugenia next. You can unmute yourself and ask your question.

Eugenia Cox: Hello. Eugenia Cox, contractor with Texas VR. Can you hear me okay?

Keitra Hill: Yes.

Eugenia Cox: On the question on the signature of the plan, Texas has had the same electronic signature process for years and years and years, even before COVID. And it's like an ATM. The client is given a PIN number to be able to sign the IPE. Now, we've continuously sent in the policy to let SSA know of this. And we are continually asked to send the policy with every PVR, with every IPE submission. Is there something we can do that we don't have to send the policy every single time with every document that we send in that includes an IPE?

Keitra Hill: Thank you so much for that question, Eugenia. We actually have received confirmation from SSA more recently that it is approved. So, at this time, I'll let SSA chime in if you'd like. But as far as the team is concerned with processing those claims, they are aware that it is an approved signature that they can accept.

Eugenia Cox: Okay, thank you. So, we don't need to be sending in the policy with every IPE?

Keitra Hill: Raquel, I saw you come off mute. Did you want to add something here?

Raquel Donaldson: No, no, no. What you said was perfect. No, all the technicians are aware that we have approved the way that Texas submits with the PIN number. Everyone should be aware of that information. If they miss one or two, it's human error. And if it comes to VR Helpdesk, Eugenia, then you can just reach out, let us know, and then it's not a problem for us to send out a reminder to the technicians that this is the way it is for Texas. Or for any other VR. Thank you.

Eugenia Cox: Perfect. Thank you so much.

Raquel Donaldson: Sure.

Keitra Hill: Thank you, Eugenia. Thank you, Raquel, for chiming in. Emani, who do we have next?

Emani: Hi, Keitra. Yes, we have Anita. You can unmute yourself and ask your question.

Keitra Hill: Anita, go ahead. Anita, are you off mute or did you lower your hand? I think you may have lowered your hand.

Anita: Hello.

Keitra Hill: Hi.

Anita: I'm sorry.

Keitra Hill: Oh, no worries.

Anita: Okay, this is my question. We have some counselors that are very detailed and some that are not. So, my question is, when I'm submitting all the documentation, if I have everything except for a case note, copies of case notes, will the claim be denied because there are no case notes, but it has everything else that is required?

Raquel Donaldson: Hi Anita. It's Raquel. Yes, it will be denied because case notes are required whenever we send out the PVR request and the late start of SGA request, that is on there. The comments say, please submit or please provide signed IPE and case notes, and the PVR as well says the same. It's on everything.

Anita: Okay. So, the level of detail in the case note doesn't matter as much as long as that case note is submitted, even if it's something really brief?

Raquel Donaldson: We want to make sure the technicians, we train all the technicians to go through and read. So, we can't see, you know, of course we don't want to see something that says blah, blah, blah, you know, that has nothing to do with the client.

Anita: Correct.

Raquel Donaldson: Like you said, you have some counselors that write dissertations.

Anita: Correct.

Raquel Donaldson: Then you have some that are briefer. That's fine.

Anita: Okay.

Raquel Donaldson: We don't know everything on our side, but we want to make sure when we read that, that it does pertain to the client and the assistance that the client is receiving from the VR.

Anita: Okay. That's clear. Thank you.

Raquel Donaldson: You're welcome.

Keitra Hill: Thank you. Thank you, Anita. Thank you, Raquel. I believe we have one last hand raised. Emani, can you announce who that is?

Emani: Hi, Keitra. Yes, we have Brenda. You can unmute yourself and ask your question.

Keitra Hill: Hi Brenda. Your mic is available for you to unmute and ask your question. Okay. We will come back in just a moment. Emani, who's the next raised hand we have?

Emani: Hi, Keitra. Yes, it's Melissa. You can unmute and ask your question.

Melissa: Can you hear me?

Keitra Hill: Yes.

Melissa: This is Melissa from Missouri Blind VR. My question is, are the issues with the portal being fixed? I know as of last week when I tried to submit claims, I was getting the error messages still.

Keitra Hill: I would defer that question to SSA, maybe Katie.

Katie Striebinger: Hi, this is Katie Striebinger. Is that something you forwarded to the helpdesk?

Melissa: Yes, I inquired with the helpdesk, and they said that there was no timeline as of then, which I got that email at the end of December 12/30. But as of last week, when I was still trying to submit last Tuesday, so a week ago today, it was still getting kicked out in the middle of a claim.

Katie Striebinger: Okay. I will ask for that to be escalated, and we'll get back to you. We'll get back to your email.

Melissa: Okay. Thank you.

Keitra Hill: Thank you. Okay. Can we try Brenda one more time? Brenda, your mic is available for you to unmute and ask your question. Can you please try to do so? All right. I believe we did have one other hand raised. I believe it was Eugenia. Did you have a question? If you could please raise your hand again. Okay, there you go.

Eugenia Cox: Sorry about that.

Keitra Hill: No worries.

Eugenia Cox: This may have already been addressed by Raquel, but we've been having trouble with when we submit PBRs, they're being denied 650 that we didn't send anything, and we have to turn around and send a copy. We take a picture of the diary and then the section that shows that we faxed it. Is that still an issue, or are we still making sure we have to copy everything to send it?

Raquel Donaldson: Thanks for bringing that up, Eugenia, because that is definitely a system issue that we are dealing with. As a matter of fact, there is a meeting on the schedule for next week regarding that. So, unfortunately, right now, because we don't have a resolve for that, do whatever you need to do. We do apologize for these system errors, and when you get that 650 and we go into the system, we do see where, hey, you have faxed in the documentation, so we quickly turn it around with a reconsideration and getting it paid. But in the meantime, until we have this matter resolved, please keep doing what you're doing in regard to reaching out to us, taking the picture, doing what you know needs to be done on your side just to prove that the documentation has been sent.

Eugenia Cox: Yeah.

Raquel Donaldson: Unfortunately, we don't know what it is, so we can go in and see it after the fax, so we're working on it. But please, anyone who's getting that 650 denial, let me say this. If you're getting the 650 and you know that you have faxed in the requested documentation, please feel free to reach out to the VR helpdesk. They immediately escalated it to me, and I get the reconsiderations out there and paid. Until we have a resolution for this, please continue to do that.

Keitra Hill: Yeah, and make sure you snip a picture of the diary itself and then the proof that you sent it on that fax status. That makes it a lot easier for Raquel, I'm sure.

Raquel Donaldson: Thanks, Eugenia. And also remember that you're able to go into the portal to see that the fax was successful going through.

Keitra Hill: Yes.

Raquel Donaldson: That's most important. If you do not see that the fax was successful, the portal will tell you so. It will show on our end, we'll see awaiting fax. So that means somewhere it got lost and we don't even have it. So that's important as well. You know, you guys have the checks and balances on your end to go in and check to see, did that fax actually go through to us and made it to us successfully?

Eugenia Cox: Perfect. Thank you.

Keitra Hill: Thank you, Eugenia. Thank you, Raquel. We do have another hand raised. Cassie, if you could go ahead and unmute yourself and ask your question.

Cassie: I always panic a little bit when I try to unmute myself. I have a question I am running into any time that I try to assign a Ticket after 30 days that nothing happens. It just pops it back to the assign a Ticket screen. Is this something that's going to be addressed?

Keitra Hill: Have you already sent an inquiry to the helpdesk in reference to that?

Cassie: Yes.

Keitra Hill: Okay. Katie, I saw you come off mute. You want to address the question?

Katie Striebinger: Yes. Can you repeat it again? I feel like I missed what you were saying. Since I haven't seen the email come up yet, I just wanted to make sure I heard it from you.

Cassie: That's okay. So, if it's been more than 30 days, I'll go in to manually assign a Ticket. And there's not even an error that comes up, so I'll fill in the information, hit submit, and a screen will flash really quickly, like a fraction of a second, and then it just goes back to that blank assign a Ticket screen. And the Ticket doesn't get assigned. And so, I've been submitting a lot of helpdesk Tickets asking to have Tickets assigned. And it started about the time that we did that last big update, like around the 1st of November or so.

Katie Striebinger: So, yeah, I mean, like I said, we'll see if we can find an email that you've been sending. You know, usually we do start to try to figure out what browser you're using. You could be using a browser that is, you know, the thing you're seeing clicking in the background it could be the browser that you're using. You know, there actually has still not been a fix, you know, from the original creator of the problem. But, yeah, we'll go back and look at it. Thank you, everyone, for bringing their issues up on the call so we can go back and search through the emails and see if we can get more information because some of these things should have been resolved with the information we've sent out. And if there is anything, you know, still outstanding, we want to make sure that we're aware of it. We thought most of these things we've either sent to a solution or workaround for. You know, yeah, most of the stuff in the Portal should be working at 99% at this point. We consider it operational. Thanks for bringing this up. We'll go back and look for that email.

Keitra Hill: Thank you, Cassie. Thank you, Katie. Brionna, who do we have next for raised hand?

Brionna (TPM Logistics): Yes. One second. We have Brenda.

Keitra Hill: Brenda, if you could go ahead and unmute yourself and ask your question, your mic is available. And Brenda, that mic is to the top right besides, like right beside Leave the Meeting beside the camera if you have that feature available. Again, if you could try to unmute yourself and ask your question. Okay. We will come back. Brionna, who's our next caller with their hand raised?

Brionna: We have Kristin. Kristin, if you want to unmute yourself and ask your question.

Kristin: Yes. Hi, Kristin from New Hampshire. So not really a question. I'm just going to echo what the last person said, is that I am having the same issue with individually assigning Tickets. I have not sent anything into the helpdesk yet because yesterday was my first time doing it this new year. I did it in 2024, and everything was fine for me. But yesterday I thought maybe it was on my end or something. I was just going to try again today. But I was having the same issue with multiple people trying multiple browsers and it was not working.

Katie Striebinger: This is Katie again. If you could please try again today and then send us an email to the help desk, that would be great so that we can troubleshoot.

Kristin: Will do. Thank you.

Katie Striebinger: Thank you. Yeah, I would say if you have an issue, please email the helpdesk because, you know, sometimes we think it's a one-off and we help the one individual and we don't realize that, you know, other people may be experiencing the same issue. So, hearing that multiple people have the same issue helps us figure out that something has happened in the background. So please report.

Keitra Hill: Thank you, Katie. We are going to take one last question. I believe we have one more hand raised and then we're going to close out the call for today. Brionna, can you announce who that is?

Brionna: Yes, we have Colleen. Colleen, if you want to unmute yourself and ask your questions.

Colleen: Hi, excuse me, this is Colleen with Indiana VR. This was actually on the same subject when the first person mentioned about the Ticket assignments. It has been going on since November. I actually found a workaround if you would like me to share that.

Keitra Hill: Absolutely. Please do.

Colleen: Okay. Basically, if you fill it out and it does the flash and it comes back to the blank screen, you fill it out again. Excuse me. And submit. And then it will tell you, you can't do that because the Ticket is already assigned. If you then hit the back button on your browser, it will take you back to the person's kind of homepage on the portal. If you do anything else, it's going to give you that error screen and basically kick you out. So basically, the process is you have to fill it out twice and then hit the back button on the browser and that will get you the Ticket assigned.

Keitra Hill: Thank you so much for that workaround. Much appreciated.

Colleen: You're welcome.

Keitra Hill: Again, as Katie said, please do make the helpdesk aware that is occurring, so we know that it's more possibly a system issue rather than an individual issue because of a browser. So please do make us aware. But thank you so much for that workaround for those that, you know, have that issue at this time. All right. Thank you so much for that last question.

We'll move on to Upcoming Events. So next slide, please. Our next event this month is the Work Incentive Seminar Event, our WISE event. You can promote that event or if you'd like to join the WISE webinar, we do have those on the fourth Wednesday of every month. The next webinar event title will be “Ticket to Work and Mental Health”. And that will be on January 22 from 3:00 to 4:00 p.m. Eastern time.

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

So next, our next call date actually was moved. It was originally planned for April 8. It's been moved to Tuesday, April 15, due to the CSAVR conference that's the week of April 8. Again, the next call is Tuesday, April 15, from 1:00 to 2:00 p.m. Eastern time. Please send All VR Call training suggestions to the VR.Helpdesk@ssa.gov. And you want to send those suggestions by Friday, March 7. Please do try to meet that date. We would hate to miss, you know, any suggestions that you have because they were received later. So, again, send those to the VR.Helpdesk@ssa.gov.

I want to thank everyone again. Happy New Year. Thank you so much for your participation in today's call. Renee Moore, thank you so much for your overview of Section 301 and how we can assist beneficiaries through that process. Thank you, everybody, for joining today's call. This call has now been concluded.