



QUARTERLY ALL VR CALL RECAP

JANUARY 13, 2026

TPM Welcome and Logistics

Katherine Jett, Project Coordinator (TPM)

Katherine welcomed everyone to the call and covered logistics and the agenda, which included: Announcements, VR Case Closures and Ticket Assignment, Ticket to Work Survey, Documentation Required for Diarized Claims, Top Three Payment Denials – 4th Quarter 2025, 2025 Year in Review, Question and Answer Session, and Upcoming WISE Event. Katherine introduced the main speaker for the call, Kimberly Cutler.

Announcements

Kimberly Cutler, Ticket Operations Manager (TPM)

Kimberly announced the 2026 Substantial Gainful Activity (SGA) Monthly Amounts, reminded participants of the due date for the Fiscal Year (FY) Cost Formula, and shared the new email address for SSA Suitability Office.

- **2026 Monthly SGA Monthly Amounts**
 - Non-Blind Individuals \$1,690
 - Blind Individuals \$2,830
- **Fiscal Year (FY) 2026 Cost Formula**
 - Administrative, Counseling, and Placement (ACP) cost data is due Friday, January 30, 2026.
 - Please contact Raquel Donaldson (Raquel.L.Donaldson@ssa.gov) if an extension is needed.
- **New Email Address for SSA Suitability Office**
 - SecRes.PerSec.Contractor.Vetting@ssa.gov



VR Case Closures and Ticket Assignment

Renee Clarke, Payments and Systems Branch Chief (SSA)

Renee provided guidance on Ticket closures. State Vocational Rehabilitation (VR) agencies shall process all case openings (or Ticket assignments) and closures (or Ticket unassignments) via the Ticket Portal; this may be done individually, or by uploading a file with multiple SSNs. If you encounter an unexpected error while attempting to assign a Ticket, please email the error code to the VR Helpdesk at VR.Helpdesk@ssa.gov. Following a case opening or closure, the beneficiary will receive an automatic letter from SSA informing them of their Ticket status.

Ticket to Work Survey

Ellie Stinnett, Economist (SSA)

Ellie informed VRs that SSA is evaluating the Ticket to Work Program to help SSA understand best practices and identify potential improvements. Ellie shared the following information:

- **Survey:** Mathematica will email a link to the survey to the SSA Coordinator at each VR agency (\$40 check for completion).
- **Interviews:** Mathematica will contact Ticketholders by mail and phone inviting them to be interviewed (\$40 gift card for completion).
- Please complete the survey and encourage your clients to participate in the interviews, if contacted.
- For questions: Contact Eleanor.Stinnett@ssa.gov.

A brief Q&A session was held for VRs to ask questions.

Documentation Required for Diarized Claims

Kimberly Cutler (TPM)

Kimberly presented the four most common reasons claims are diarized and provided the diary text and documentation required for each reason.



Reasons Claims Are Diarized

- Information is required because the case was selected for a Pre-Payment Validation Review (PVR) to ensure that VR services and costs meet the requirements for the requested payment.
- Information is missing for direct/other costs that is required for the requested payment.
- Information is required to explain the late start of substantial gainful activity (SGA).
- Key information is missing that is required for the requested payment.

Information Required for a Pre-Payment Validation Review (PVR)

Diary Text	Documentation Required
Information is required because the case was selected for a Pre-Payment Validation Review (PVR) to ensure that VR services and costs meet the requirements for the requested payment.	<ul style="list-style-type: none">Signed SSA-199 with cost listed in numerical orderProof of payment for requested services (should be submitted in the same numerical order as the SSA-199)Signed Individualized Plan for Employment (IPE) or amended IPECase/Progress Notes

Information Missing for Direct/Other Costs

Diary Text	Documentation Required
Some costs requested are missing or within a date range outside of the Payment Period.	SSA-199, which details the cost incurred within the Net Payment Period.

Information Required for the Late Start of SGA

Diary Text	Documentation Required
Please submit signed IPE and case notes.	Signed IPE and case notes (or similar documentation) to substantiate the claim.



Other Information is Missing

Diary Text	Documentation Required
Proof of payment needed with warrant or procurement numbers required for invoice amount \$XX.XX.	Proof of payment (e.g., invoice) with warrant or procurement number.
Proof of payment required for invoiced amounts of \$XX.XX, \$XX.XX, \$XX.XX.	Proof of payment for a specific direct cost.
Proof of payment for direct cost requested.	Proof of payment for a specific direct cost.
Fiscal Year (FY) Cost Formula needed to process this claim.	Administrative, Counseling, Placement (ACP) Cost for the current fiscal year should be sent to SSA for approval.

Faxing Required Documentation

Kimberly Cutler (TPM)

Kimberly provided the steps for faxing required documents to ensure VRs are submitting all required documentation.

1. **Collect all Required Documents**
 - Review "Diary Explanation Text" to identify and gather required documentation necessary for the claim to be processed.

2. **Generate New Fax Cover Sheet**
 - Select "View All Pending Payments for Me"
 - Click on the "Actions" link next to the appropriate payment request.
 - Click "Fax additional information"

3. **Check Fax Status**
 - Find the SSA reference number on "View All Pending VR Payments for me"
 - Click "Actions" link
 - Click "Show Fax Status" link
 - There will be a fax receipt date if SSA received the fax.

4. **Contact VR Help Desk**
 - Please contact VR.Helpdesk@ssa.gov if 30 days have passed since you submitted all required documentation, and your claim has not been processed yet.



Top Three Payment Denials – 4th Quarter 2025

Kimberly Cutler (TPM)

This discussion covered the top three payment denials for the 4th quarter of 2025. In addition to the denial reasons, Kimberly also provided a description of each denial and tips to avoid denials.

1. Payment Denial Reason - Untimely Filing: Code 620

Initial Claim

- **Description**
 - The initial claim was filed more than one year from the last month of SGA.
- **Tip to Avoid Denial**
 - Review the earnings provided on the Vocational Rehabilitation Client Earnings Report (VRCER) to ensure the claim is filed no more than one year from the last month of SGA.

Earnings Reconsideration

- **Description**
 - The reconsideration claim for an earnings denial was filed more than one year from the initial claim decision date.
- **Tip to Avoid Denial**
 - Review the notice of determination from the initial claim to ensure the reconsideration is filed no more than one year from the decision date.

Non-Earnings Reconsideration

- **Description**
 - The non-earnings reconsideration claim was filed more than 60 days from the initial claim decision date.
- **Tip to Avoid Denial**
 - Review the notice of determination from the initial claim to ensure the reconsideration is filed no more than 60 days from the decision date.



2. Payment Denial Reason - 8 Months or Less of SGA: Code 220

- **Description**
 - 8 months or less of verified earnings were found in SSA's records.
- **Tips to Avoid Denial**
 - If an initial claim was denied due to insufficient earnings, please wait an additional six months to submit a reconsideration claim to avoid another 220 denial.
 - Submit proof of earnings with claim. Acceptable earnings documentation includes, but not limited to:
 - Vocational Rehabilitation Earnings Report (VRCER)
 - Office of Child Support and Enforcement (OCSE) data
 - The Work Number Report
 - Pay stubs
 - Employer Signed Statement with FICA withholdings

3. Payment Denial Reason – Reconsideration Claim Already Denied Once for the Same VR Period: Code 621

- **Description**
 - VR agencies may only request one reconsideration after an initial claim has been denied.
- **Tips to Avoid Denial**
 - Review prior claim information to see if the reconsideration was already denied.
 - Do not resubmit another reconsideration claim unless directed to do so from the VR Help Desk.



2025 Year in Review

Kimberly Cutler (TPM)

Kimberly shared the VR Payments statistics for calendar year 2024 vs 2025.

Statistics	CY 2024	CY 2025
Receipts	23,795	19,979
Payments	\$149,237,884.76	\$121,091,529.34
Claims Processed	24,652	17,717

Questions and Answers

A question-and-answer period followed, which is part of the call recording.

Upcoming Event

Kimberly Cutler (TPM)

Kimberly announced that the next Work Incentive Seminar Event (WISE) webinar is scheduled for January 28, 2026, 3:00 p.m. – 4:30 p.m. ET.

Next Quarterly All VR Call

Kimberly Cutler (TPM)

Kimberly also announced that the next All VR call will be held on Tuesday, April 7, 2026, 1 p.m. ET.



Resources

Phone

- Monday through Friday 9 a.m. – 5 p.m. ET
- Toll Free: 1-866-949-3687/TTY: 1-866-833-2967
 - Option 1: Beneficiary Help Desk
 - Option 2: EN Payments Help Desk
 - Option 3: EN Systems Help Desk

Email

For issues regarding Cost Reimbursement, Ticket assignment, the service provider website, and the Ticket Portal, email VR.Helpdesk@ssa.gov. Please be sure to include your VR's PID with every inquiry sent.