Quarterly All VR Call

There will be audio silence until the call starts at 1 p.m. ET



October 13, 2026

Agenda

- Welcome and Logistics/Housekeeping
- Announcements
- Ticket Portal Enrollment Reminder
- Troubleshooting Ticket Portal Issues
- Acceptable Signatures Reminder
- VR Outreach
- Section 301 Claims
- Top Three Payment Denials
- Question and Answer Session
- Closing



Logistics/Housekeeping

- **This call is being recorded and transcribed.**
  - Participants are not permitted to record this meeting nor capture the transcript.
- **During the Q & A Session:**
  - Chat is not active for today's call. You must ask your question aloud.
  - If joining via phone and you wish to ask a question, raise your hand utilizing *5 and you will be unmuted by the Facilitator; then press *6 to unmute yourself.
  - If joining on the MS Teams app, click the raise hand icon, and a Production Team Member will provide access to audio to allow you to unmute your microphone.

Logistics/Housekeeping Cont. (2)

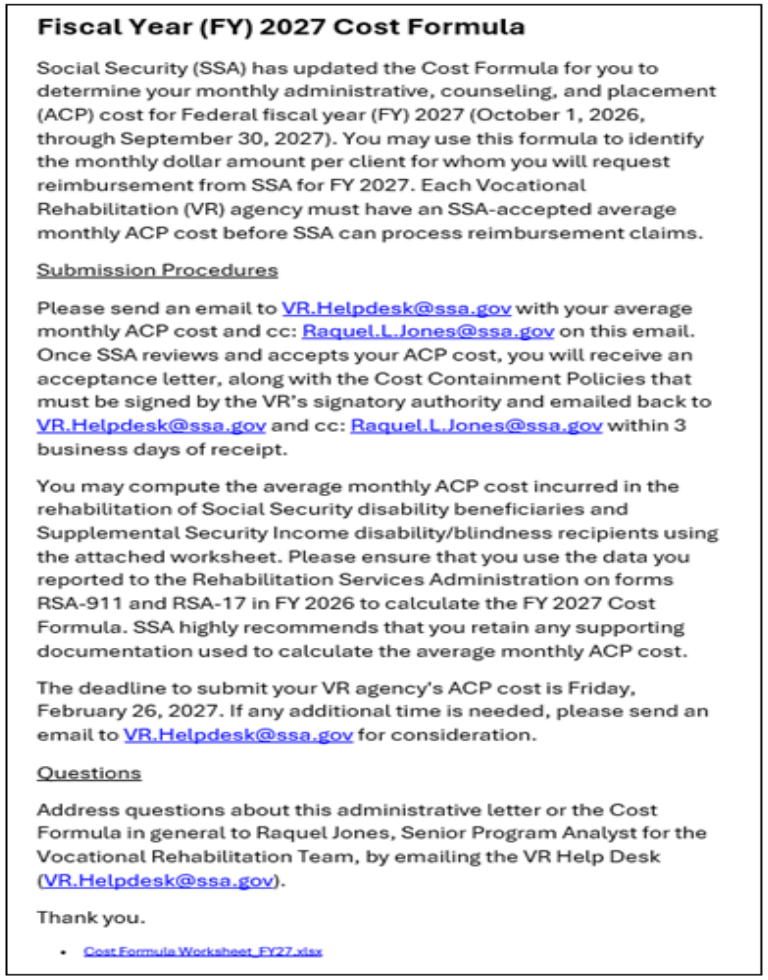
- **Please ask only one question each time you are called upon by the Facilitator.**
  - Additional questions or comments can be sent to: VR.Helpdesk@ssa.gov**.**
  - Questions not answered during the live event will be forwarded to the appropriate panelist for comment.
- **Closed Captioning is available for participants who join using the MS Teams Application or utilizing the separate Closed Captions 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.”
  - When using the link option, paste the link in the browser and it will open in a separate window to view Closed Captions.

Announcements & Reminders

***Jocelyn Greenidge**, TPM Sr. Program Director*

Fiscal Year (FY) 2027 Cost Formula

- On October 6, SSA sent out information announcing the update to the Cost Formula for SVRAs to determine their monthly administrative, counseling, and placement (ACP) cost for Federal fiscal year (FY) 2027 (October 1, 2026, through September 30, 2027).
- The deadline to submit your VR agency's ACP cost is Friday, February 26, 2027.



Fiscal Year (FY) 2027 Cost Formula

Social Security (SSA) has updated the Cost Formula for you to determine your monthly administrative, counseling, and placement (ACP) cost for Federal fiscal year (FY) 2027 (October 1, 2026, through September 30, 2027). You may use this formula to identify the monthly dollar amount per client for whom you will request reimbursement from SSA for FY 2027. Each Vocational Rehabilitation (VR) agency must have an SSA-accepted average monthly ACP cost before SSA can process reimbursement claims.

Submission Procedures

Please send an email to VR.Helpdesk@ssa.gov with your average monthly ACP cost and cc: Raquel.L.Jones@ssa.gov on this email. Once SSA reviews and accepts your ACP cost, you will receive an acceptance letter, along with the Cost Containment Policies that must be signed by the VR's signatory authority and emailed back to VR.Helpdesk@ssa.gov and cc: Raquel.L.Jones@ssa.gov within 3 business days of receipt.

You may compute the average monthly ACP cost incurred in the rehabilitation of Social Security disability beneficiaries and Supplemental Security Income disability/blindness recipients using the attached worksheet. Please ensure that you use the data you reported to the Rehabilitation Services Administration on forms RSA-911 and RSA-17 in FY 2026 to calculate the FY 2027 Cost Formula. SSA highly recommends that you retain any supporting documentation used to calculate the average monthly ACP cost.

The deadline to submit your VR agency's ACP cost is Friday, February 26, 2027. If any additional time is needed, please send an email to VR.Helpdesk@ssa.gov for consideration.

Questions

Address questions about this administrative letter or the Cost Formula in general to Raquel Jones, Senior Program Analyst for the Vocational Rehabilitation Team, by emailing the VR Help Desk (VR.Helpdesk@ssa.gov).

Thank you.

- Cost Formula Worksheet_FY27.xlsx

Ticket Portal Enrollment Reminder

Ticket Portal Enrollment Reminder

- To gain access to the Ticket Portal, VR staff must:
  - Attain suitability clearance
  - Create a *my* Social Security account with advanced security
  - Receive authorization from SSA
- Once you receive your suitability letter, please email VR.Helpdesk@ssa.gov to request to be enrolled in the Ticket Portal. Suitability clearance alone does not grant access to the Ticket Portal. SSA must enroll you as a new user.
- The VR Helpdesk will verify that you have a *my* Social Security account with advanced security. We encourage you to create a *my* Social Security account using your personal email address, since this is your personal *my* Social Security account.
- VR staff **should not** share the Ticket Portal link or Portal screen shots with unauthorized VR agency staff. Agency staff are not authorized to use the Portal until enrolled by SSA.
- SSA enrolls all new users and provides a "Welcome Letter," which includes the Ticket Portal link.

Troubleshooting Ticket Portal Issues

Alexis Thomas, SSA

Troubleshooting Ticket Portal Issues

- Most Ticket Portal issues can be resolved by taking the following steps:
  - Clear your browser history and cache and copy and paste the portal link provided in the Welcome Letter email directly into your browser. If you rely on a shortcut on your desktop or favorite in your browser, it can sometimes point to a broken link.
  - If you have another browser available, try using another browser. For example, if you normally use Edge but can use Chrome, please try using Chrome.
  - If there is no change, restart your computer.

Troubleshooting Ticket Portal Issues Cont. (2)

If your issue is not resolved by taking the steps on the previous slide, reach out to VR.Helpdesk@ssa.gov and provide the following information:

- Your agency's Provider ID (PID)
- List the troubleshooting steps you performed (previous slide).
- Provide the browser and browser version you are using. Sometimes browser updates occur before SSA can update the Ticket Portal to accommodate them.
- List the action you were trying to complete and the steps you followed before you received the error. There are multiple ways to access some portal screens, and we need to be able to recreate your steps.
- Include a screenshot of the error message.

Acceptable Signatures Reminder

Acceptable Signatures

- SSA will accept the following signatures on an Individualized Plan for Employment (IPE) or SSA-199 form:
  - Wet signatures
  - DocuSign signatures
  - Time/date stamped signatures
  - /s/ + typed name
  - Cursive font typed signatures
  - Pin with attached statement

*SSA made a temporary exception during COVID, accepting an email, phone call, or proof of commitment from the client of their intent to sign the IPE. SSA no longer accepts this as a valid signature.

VR Outreach

VR Outreach

- SSA is performing a courtesy outreach to SVRAs when SSA needs additional information to pay a pending VR claim.
- SVRAs will receive an email from a new SSA email address: VR.Pending@ssa.gov.
- The email will have the subject line: **VR CR Request for Documentation – PID #; Reference Number #**.
- The email will list the required documentation. Examples are:
  - An updated IPE with necessary signature(s)
  - Case notes
  - Proof of payment

VR Outreach Cont. (2)

- SVRAs should fax the required documentation to SSA using a Ticket Portal-generated fax coversheet. To generate a fax coversheet:
    1. Select “View All VR Pending Payments for Me” from the Main Menu.
    2. Type the SSA reference number included in the outreach email in the search bar.
    3. Click the “Actions” link on the right-hand side of the screen.
    4. Click “Fax Additional Information”.
    5. Select the correct document type and generate a fax coversheet.
    6. Follow the directions on the fax coversheet.
    7. Once you have sent the fax you can use the “Check Fax Status” link to confirm receipt.
- SVRAs will still be held to the original documentation due date.

Section 301 Claims

Shada Roper, SSA

Overview – Topics by Section

- **Background and Eligibility**
  - What Section 301 is and who qualifies
- **Determination**
  - How the Section 301 determination is made and documented
- **Processing and Roles**
  - Office of Disability Operations (ODO) rules, the 301 mailbox, and who does what
- **Reviewing the Claim**
  - Screen-by-screen walkthrough of a 301 claim through payment
- **Resources and Questions**
  - Contacts

What Is a Section 301 Claim

20 CFR 404.2112 – Payment for Vocational Rehabilitation (VR) services when an individual continues to receive disability payments based on participation in an approved VR program.

Benefits Continue

An individual whose disability has ceased may continue to receive disability benefits because of continued participation in an approved VR program.

VR Agency Can be Paid

A VR agency can be paid for the cost of VR services if the individual was receiving benefits in a month (or months) after October 1984.

Payment Period

Services must be provided within the period specified in 20 CFR 404.2115, subject to the other payment and administrative provisions of the subpart.

Who Can Receive Section 301 Payments

Individuals whose benefits are based on disability or blindness

Title II (SSDI)

- Disability Insurance Benefits (DIB)
- Disabled Widow(er)'s Benefits (DWB)
- Childhood Disability Benefits (CDB)
- Career railroad workers and/or Railroad Retirement Board annuitants

Title XVI (SSI)

- Recipients whose benefits are based on disability or blindness
- Age 18 recipients whose disability is found to have ended because of the age redetermination

Minors: *Children under 18 are also eligible. Individuals in an Individualized Education Plan (IEP) must be age 18-21.*

Eligibility Requirements and When They End

Applies after a medical cessation or an age 18 ineligibility determination

Must Meet All of These

- Participates in an appropriate program of VR, employment, or other support services.
- Began participating before the month the disability or blindness ceased.
- Participation continues through the 2-month grace period after cessation.
- SSA determines completing or continuing the program will increase the likelihood the individual will not return to the benefit rolls.

Eligibility Ends When

- The individual completes the program.
- The individual stops participating for any reason (excluding temporary interruptions).
- SSA determines continued participation will no longer increase the likelihood the individual will not return to the rolls.

Does not apply *when the medical cessation is due to failure to cooperate (FTC) or whereabouts unknown (WU).*

Where the 301 Process Begins

From medical cessation to the section 301 determination

DDS Finds the Disability has Ceased

- The Disability Determination Services (DDS) determines that the disability or blindness has ceased.

ODO makes the 301 determination

- Office of Disability Operations (ODO) decides initial and continuing Section 301 eligibility. The Disability Examiner (DE) specifies the 301 determination in Item 29 of Form SSA-833 (Title II) or on the SSA-832 (Title XVI).

DE sends it to the 301 mailbox

- The DE sends the 301 determination information and supporting forms to VR.301.Claims@ssa.gov.

Note: *A Continuing Disability Review (CDR) can take up to 24 months.*

Form SSA-4290-F5

Form **SSA-4290-F5** (02-2025) UF
Discontinue Prior Editions
Social Security Administration

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OMB No. 0960-0282

Development of Participation in a Vocational Rehabilitation or Similar Program

Part 1 - To be completed by the State DDS or SSA Field Office

Section A - Beneficiary Information

1. Beneficiary's Name (Last, First, MI)	2. Beneficiary's Date of Birth	3. Type of Claim
	08/31/2006	☐ DI ☒ SSI ☐ Concurrent

4. Beneficiary's Social Security Number	5. Wage Earner's Social Security Number (if different from Beneficiary's)

6. Beneficiary's Address (Number & Street, City, State, ZIP Code)

Roles and High-Level Responsibilities

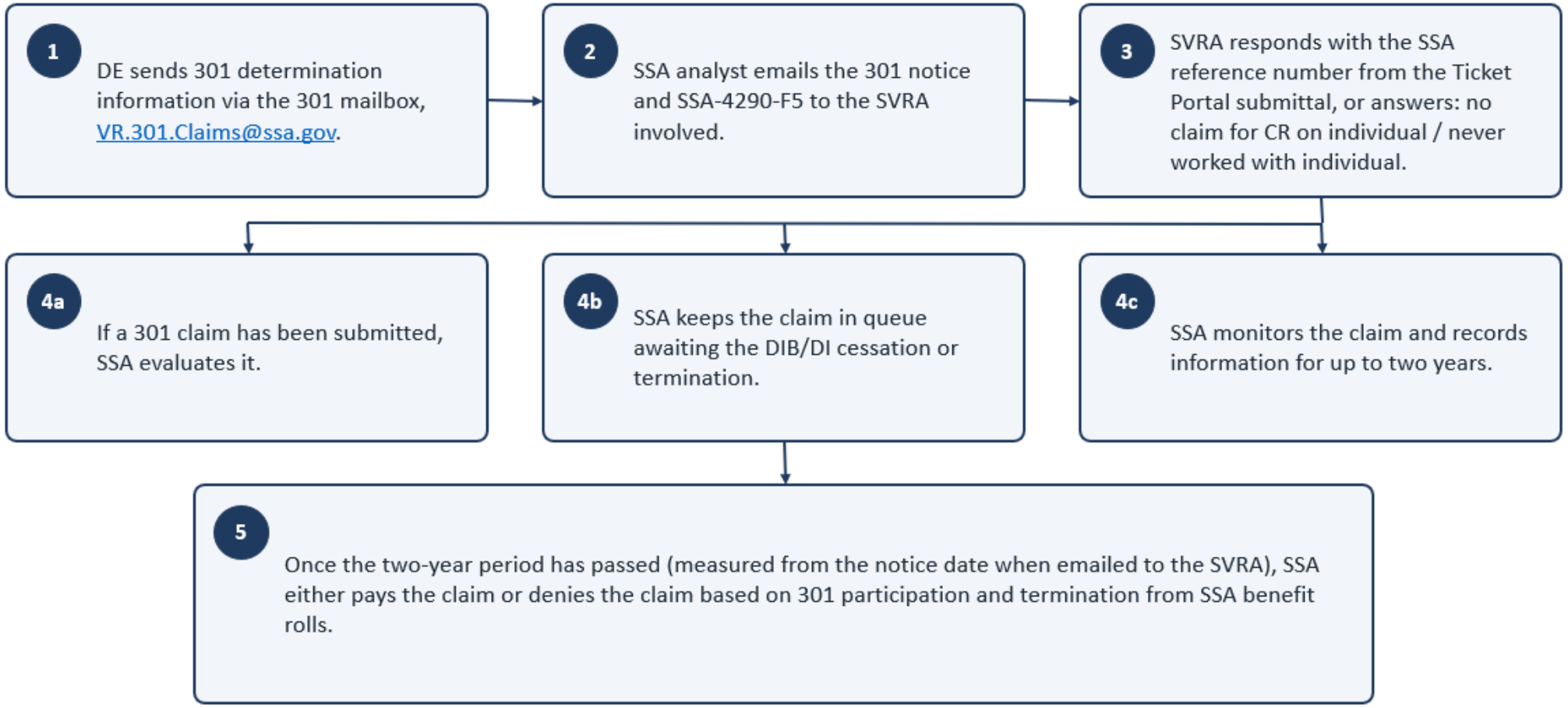
VR Policy Team Analyst

- Monitors the VR.301.Claims@ssa.gov mailbox for incoming 301 claims with supporting documents and forms (e.g., SSA-4290-F5, 553, 833) approved by the DE from ODO.

Policy Team Analyst (PTA)

- Reviews the forms and sends the 301 notice, forms, and 301 letter by email attachment to the VR agency involved. Waits for the VR's email response with either a SSA reference number or information stating whether a 301 claim could be filed based on the SSA-4290 and claimant information.
- Reviews claims for 301 processing, using all systems and necessary documents to determine payment.

Section 301 Claims Processing Flow



Questions?

CONTACT US

VR Helpdesk
VR.Helpdesk@ssa.gov

301 Mailbox
VR.301.Claims@ssa.gov

Shada Roper
shada.t.roper@ssa.gov

Thank You!

Section 301 Claims Process • VR Training

Top Three Payment Denial Reasons 3rd Quarter 2026

Top Three Payment Denial Reasons

Denial Code	Denial Reason	Q3 2026 Total
620	Untimely Filing for Claims	553
220	8 Months or Less of SGA	322
320	9 Months of SGA But Not Within 12-Month Period	318

Payment Denial – Code 620

Denial Reason

- Untimely Filing (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.

Payment Denial – Code 620 Cont. (2)

Denial Reason

- Untimely Filing (Earnings Reconsideration)

Description

- The reconsideration claim for an earnings-related 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.

Payment Denial – Code 620 Cont. (3)

Denial Reason

- Untimely Filing (Non-earnings Reconsideration)

Description

- The reconsideration claim for a non-earnings-related denial was filed more than 90 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 90 days from the decision date.

Payment Denial – Code 220

Denial Reason

- 8 Months or Less of SGA

Description

- 8 months or less of verified SGA level 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 two calendar quarters to submit a reconsideration claim to avoid another 220 denial.
- Submit proof of earnings with the claim. Acceptable earnings documentation includes, but is not limited to:
  - VRCER
  - OCSS data
  - Work Number
  - Pay Stubs, or
  - Employer-Signed Statement with FICA withholdings

Payment Denial – Code 320

Denial Reason

- 9 Months of SGA But Not Within 12-Month Period

Description

- Evidence of SGA is provided but extends beyond the 12-month period.

Tip to Avoid Denial

- Review earnings details in advance to confirm that the months referenced in the claim are within the required 12-month period.



MS Teams

Raise your hand by selecting the Raise Hand icon. Your mic will be unmuted by the Facilitator. Then you must click the mic to unmute yourself.

By Phone

Raise your hand by dialing *5 and you will be unmuted by the Facilitator. Then press *6 to speak.

Q&A

Please state your first name, VR name, and ask your question.

Upcoming Event

Next Work Incentive Seminar Event (WISE) Webinar:

Find Work That Works for You

October 28, 2026, 3:00 – 4:30 p.m. ET

The Ticket Program shares important information, including Ticket Portal issues and outages, with service providers through GovDelivery messages. Please save this email address so that these messages do not go into your spam or junk email boxes: TicketToWork@subscriptions.ssa.gov.



Next Quarterly All VR Call

TBD

Please send topic suggestions for
All VR Calls to: VR.Helpdesk@ssa.gov.

Thank you for joining today's call!

