



QUARTERLY ALL VR CALL RECAP AUGUST 18, 2026

Welcome and Logistics

Katherine Jett, Project Coordinator (TPM)

Katherine welcomed everyone to the call and covered logistics and the agenda, which included: Announcements & Reminders, Suitability Clearance, Ticket Portal Enrollment Reminder, Reconsideration Policy Change Reminder, Documentation Required for Claims Placed in Diary, Top Three Payment Denials, Question and Answer Session, and Upcoming WISE Event.

Announcements & Reminders

Kimberly Cutler, VR Payments Manager (TPM)

Kimberly Cutler served as the moderator for the Quarterly All VR Call. The announcement covered that SVRAs have noticed missing Office of Child Support Services (OCSS) data in the VR Client Earnings Report (VRCER). VRs were instructed to notify their state agency if they notice missing quarterly wage data when reviewing VRCER.

She reminded VRs to ensure all documentation submitted is legible and to confirm the status of all faxes via the Ticket Portal to ensure receipt.



Suitability Clearance

Kimberly Cutler (TPM)

Kimberly provided instructions when applying for suitability clearance. She informed VRs applying for suitability clearance to start by contacting Yvette Singleton at Yvette.Singleton@ssa.gov and Cc: VR.HelpDesk@ssa.gov. Yvette will work with the VRs to ensure they have a complete package and can provide fingerprinting instructions and copies of the required forms. The additional information below was shared on the call:

- Applicants MUST complete fingerprinting before submitting a suitability application
- Required forms:
 - Declaration for Federal Employment Form 306
 - Electronic Applicant Listing
 - Must include the date fingerprinting was completed
 - Include state VR contact number (Yvette can provide)
 - CPOC Name – Signatory Authority responsible for VR contract
 - COR Name – Yvette Singleton

Ticket Portal Enrollment Reminder

Kimberly Cutler (TPM)

Kimberly clarified the steps for VR staff to gain access to the Ticket Portal, emphasizing the need for suitability clearance, creation of a **my Social Security** account with advanced security, and formal SSA authorization, with support available via the VR Help Desk.

- **Suitability Clearance Requirement:** VR staff must first obtain suitability clearance before accessing the Ticket Portal.
- **My Social Security Account Creation:** After receiving suitability clearance, staff must create a **my Social Security** account with advanced security using a personal email address.



- **SSA Authorization and Enrollment:** Once suitability clearance is received and a *my Social Security* account with advanced security is created, staff must contact the VR Help Desk to be enrolled as a new Ticket Portal user. The suitability letter alone does not grant Ticket Portal access; SSA will provide a welcome letter with the Portal link.
- **Portal Link Distribution Policy:** VR staff must **not** share the Ticket Portal link with unauthorized agency staff, as SSA manages user authorization and distribution of the Portal link. Agency staff are not authorized to use the Portal until enrolled by SSA.

Reconsideration Policy Change Reminder

Ben Lydecker, Ticket Operations Manager (TPM)

Ben provided a reminder of SSA's Reconsideration policy that went into effect May 1, 2026, allowing VR agencies up to two reconsideration requests per denied claim, with distinct filing timelines for earnings and non-earnings-related denials, and clarified acceptable earnings documentation.

New Reconsideration Limits: As of May 1, 2026, VR agencies may submit up to two reconsideration requests per denied claim for all initial claims received on or after May 1. SSA continues to expect VRs to limit reconsideration requests to those that are based on high-quality data.

- **Timely Filing Restrictions:**
 - SSA will allow a VR agency up to 90 calendar days from the denial notice date to file two reconsideration requests for a non-earnings-related claim denial.
 - SSA will allow a VR agency up to 365 calendar days from the denial notice date to file two reconsideration requests for an earnings-related claim denial.
 - SSA strongly recommends VR agencies wait at least two calendar quarters before filing an earnings-related reconsideration.
- **Reconsideration Examples**
 - **Example 1:**
 - **Initial Claim Submission Date** = 11/13/2025
 - **Final VR Closure Date** = 02/21/2025
 - **Payment Code** = 220
 - **Decision Date** = 12/11/2025

Since the Initial **Claim Submission Date** is prior to May 1, 2026, the VR only gets **one reconsideration**. Based on the **Payment Code** of 220, the VR has 365 days to submit a reconsideration.

○ **Example 2:**

- **Initial Claim Submission Date** = 05/20/2026
- **Final VR Closure Date** = 07/21/2025
- **Payment Code** = 220
- **Decision Date** = 08/02/2026

Since the Initial Claim Submission Date is after May 1, 2026, the VR gets up to 365 days to submit two reconsideration requests.

- **Earnings-Related Denial Criteria:** No changes were made to what constitutes an earnings-related denial. The chart below was provided to show earnings-related denials.

Denial Code	Denial Reason
200	WORK ACTIVITY COULD NOT BE ESTABLISHED (NO EARNINGS OR NOT VERIFIED)
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 12-MONTH PERIOD
325	9 MONTHS OF BLIND SGA BUT NOT WITHIN 12-MONTH PERIOD
590	THE VR AGENCY DID NOT PROVIDE EARNINGS DOCUMENTATION. EACH VR MUST SUBMIT PROOF OF EARNINGS WITH EVERY CLAIM



- **Acceptable Earnings Documentation:** Claims must include proof of earnings for nine out of 12 continuous months at or above SGA level (or Blind SGA if applicable). All VR agencies must submit proof of earnings documentation with initial, pre-ETS, and reconsideration claims. Acceptable documentation includes, but is not limited to:
 - The Work Number
 - Pay Stubs
 - Employer Prepared Earnings Statements with FICA withholdings
 - SSA Quarterly VR Client Earnings Report (VRCER)
 - Quarterly Office of Child Support Services National Directory of New Hire Data
 - VR remarks with applicable quarters and earnings

Documentation Required for Claims Placed in Diary

Kimberly Cutler (TPM)

Kimberly reminded VRs that all VR Cost Reimbursement claims are processed on a first-in, first-out basis within 30 days of receipt, unless additional documentation is required to validate the claim.

Kimberly explained that if further documentation is required, the claim will be placed in diary (placed on hold). She instructed VRs to review the 'Diary Reason' and 'Diary explanation text' in the Ticket Portal for the documentation necessary to process the claim.

She reminded VRs that their agency's staff is responsible for reviewing claims placed in diary to ensure the required documentation is submitted within the required timeframe. If a VR claim is not processed within five days after faxing the required documentation, VRs should email VR.Helpdesk@ssa.gov.

She also shared that SSA has observed that when additional documentation is faxed, it often remains insufficient to validate the claim.

During the presentation, Kimberly outlined the most common reasons for requiring additional documentation and included the required documentation to validate the claim.

Reasons Claims are Placed in Diary

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).

Verification of earnings review.

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 payment period.
Please submit a signed IPE and case notes.	Signed IPE and case notes (or similar documentation) to substantiate the claim.
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.
Verification of earnings review.	None. SSA is awaiting additional earnings data.

Faxing Required Documentation

Kimberly Cutler (TPM)

Kimberly shared the steps below for faxing required documentation:

1. Collect all Required Documents

- Review **“Diary explanation text”** to identify and gather required documentation necessary for the claim to be processed.
- Search for the SSA reference number on **“View All VR Pending Payments for Me.”**
- Click **“Actions”** link.
- Click **“Show Diaries”** link.

2. Generate New Fax Cover Sheet

- Select **“View All VR Pending Payments for Me.”**
- Click on the **“Actions”** link next to the appropriate payment request.
- Click **“Fax additional information.”**

3. Check Fax Status

- Search for the SSA reference number on **“View All VR Pending 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 email VR.Helpdesk@ssa.gov if five days have passed since you submitted all required documentation, and your claim has not been processed.

Top Three Payment Denial Reasons 2nd Quarter 2026

Kimberly Cutler (TPM)

Kimberly presented the top three payment denials for the 2nd quarter of 2026. Along with the denials, she provided a description of the denials and tips to help VRs avoid the denials.

Denial Code	Denial Reason	Q2 2026 Total
620	Untimely Filing for Claims	588
320	9 Months of SGA But Not Within 12-Month Period	244
220	8 Months or Less of SGA	217

1. Code 620: Untimely Filing for Claims (588 claims denied)

a. Untimely Filing (Initial Claim)

- i. Description: The initial claim was filed more than one year from the last month of SGA.
- ii. 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.

b. Untimely Filing (Earnings Reconsideration)

- i. Description: The reconsideration claim for an earnings-related denial was filed more than one year from the initial claim decision date.
- ii. 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.

c. Untimely Filing (Non-earnings Reconsideration)

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



2. Code 320: 9 Months of SGA But Not Within 12-Month Period (244 claims denied)

- i. Description: Evidence of SGA is provided but extends beyond the 12-month period.
- ii. 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.

3. Code 220: 8 Months or Less of SGA (217 claims denied)

- i. Description: 8 months or less of verified SGA level earnings were found in SSA's records.
- ii. 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.

Question and Answer Session

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

Upcoming WISE Event

Kimberly Cutler (TPM)

Kimberly announced the next Work Incentives Seminar Event (WISE) titled "What is Ticket to Work?" taking place on August 26 from 3 to 4:30 p.m. ET.



Closing

Kimberly Cutler (TPM)

Kimberly reminded the VRs that the Ticket Program shares important information, including Ticket Portal issues and outages, through GovDelivery messages. She encouraged VRs to save the TicketToWork@subscriptions.ssa.gov email address to ensure they do not miss important announcements.

The next Quarterly All VR Call scheduled for October 20, 2026, 1 p.m. ET was announced.

Kimberly invited participants to submit topics for the next Quarterly All VR Call by emailing the VR Help Desk at VR.Helpdesk@ssa.gov.