QUARTERLY ALL VR CALL RECAP
OCTOBER 13, 2026

Welcome and Logistics

Jocelyn Greenidge, Sr. Program Director (TPM)

Jocelyn welcomed everyone to the call and covered logistics and the agenda, which included: Announcements & Reminders, Ticket Portal Enrollment Reminder, Troubleshooting Ticket Portal Issues, Acceptable Signatures Reminder, VR Outreach, Section 301 Claims, Top Three Payment Denials, Question and Answer Session, and the Upcoming WISE Event.

Announcements & Reminders

Jocelyn Greenidge (TPM)

Jocelyn shared that SSA sent out information on October 6 announcing the update to the Cost Formula for State Vocational Rehabilitation (VR) agencies to determine their monthly administrative, counseling, and placement (ACP) cost for Federal fiscal year (FY) 2027 (October 1, 2026, through September 30, 2027).

She informed VRs that the deadline to submit their ACP cost is Friday, February 26, 2027.

Jocelyn also instructed VRs to follow the submission instructions in SSA's October 6 communication and to retain the documentation used to calculate their ACP costs.

Ticket Portal Enrollment Reminder

Jocelyn Greenidge (TPM)

Jocelyn 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, ideally 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.

Troubleshooting Ticket Portal Issues

Alexis Thomas (SSA)

Alexis described troubleshooting steps and the information Ticket Portal (Portal) users should provide when reporting unresolved issues. She shared that SSA staff cannot access the Portal and SSA relies on Portal users to report issues and occasionally work with SSA in testing. She explained that most 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.
- If there is no change, restart your computer.

Alexis informed the VRs that they should reach out to the VR Help Desk at VR.Helpdesk@ssa.gov if the Portal issue is not resolved. To assist SSA in troubleshooting the issue, SSA asks VRs to provide the following information when they contact the Help Desk:

- Agency's Provider ID (PID)
- List the troubleshooting steps you performed.
- Provide the browser and browser version you are using.
- List the action you were trying to complete and the steps you followed before you received the error.
- Include a screenshot of the error message.

Acceptable Signatures Reminder

Jocelyn Greenidge (TPM)

Jocelyn reminded VRs of the types of signatures that SSA accepts. She informed them that 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

Jocelyn explained that 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, *but* SSA no longer accepts this as a valid signature.

VR Outreach

Jocelyn Greenidge (TPM)

Jocelyn announced that SSA is conducting a courtesy outreach when additional information or follow-up is needed for a pending VR claim. She shared that VR agencies may receive an email from a new SSA email address: VR.Pending@ssa.gov. The subject line in the email will include VR CR Request for Documentation, PID#, and Reference Number. The required documentation needed will be listed in the body of the email (e.g., an updated IPE with necessary signature(s), case notes, proof of payment). VRs will still be held to the original documentation due date.

Jocelyn shared that VRs should fax the required documentation to SSA using a Ticket Portal generated fax cover sheet and provided the following instructions to generate a fax cover sheet:

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 cover sheet.
6. Follow the directions on the fax cover sheet
7. Once you have sent the fax, you can use the “Check Fax Status” link to confirm receipt.

Section 301 Claims

Shada Roper (SSA)

Shada shared valuable information regarding Section 301 claims. She covered the Section 301 background and eligibility, determination on how a 301 claim is made and documented, the process and roles for the Office of Disability rules, the 301 inbox, who does what, reviewing the claim in iTOPSS (screen by screen walkthrough of 301 payment process) and resources and contacts.

Shada provided a breakdown of each section.

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.

Who Can Receive Section 301 Payments

- Individuals whose benefits are based on disability or blindness

Eligibility Requirements and When They End

- Applies after a medical cessation or an age 18 ineligibility determination

Where the 301 Process Begins

- From medical cessation to the Section 301 determination

Form SSA-4290-F5



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

Page 1 of 5
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

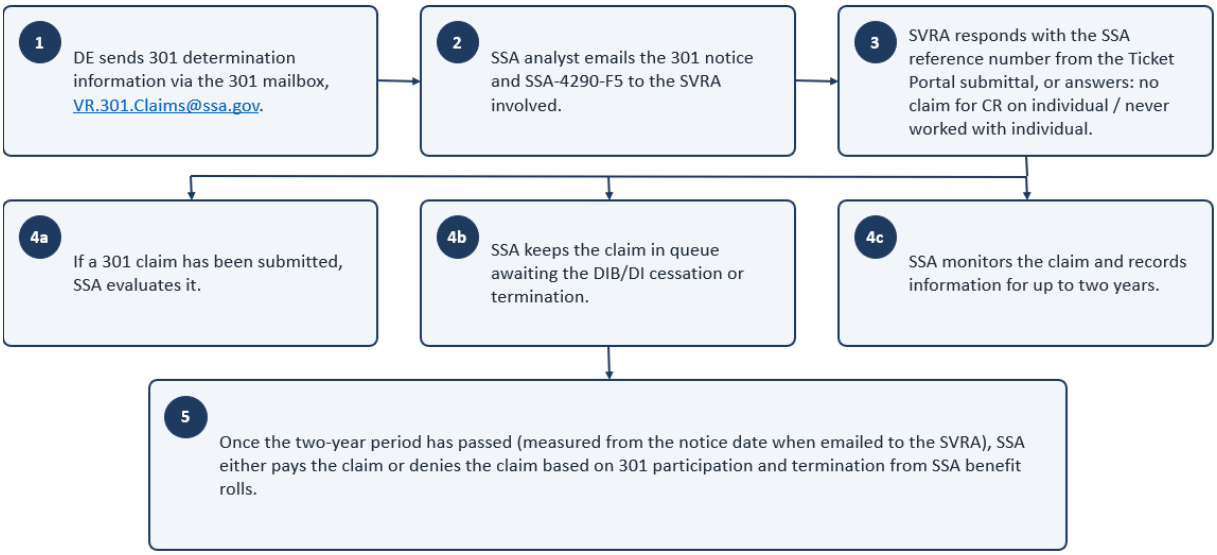
1. Beneficiary's Name (Last, First, MI)	2. Beneficiary's Date of Birth	3. Type of Claim
	08/31/2006	☐ DI ☒ SSI ☐ Concurrent
4. Beneficiary's Social Security Number	5. Wage Earner's Social Security Number (if different from Beneficiary's)	

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 an 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



Contact Information

VR Help Desk: VR.Helpdesk@ssa.gov

301 Mailbox: VR.301.Claims@ssa.gov

Shada Roper: Shada.T.Roper@ssa.gov

Top Three Payment Denial Reasons 3rd Quarter 2026

Jocelyn Greenidge (TPM)

Jocelyn presented the top three payment denials for the 3rd quarter of 2026, a description of the denials, and tips to help VRs avoid the denials.

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

1. **Code 620: Untimely Filing for Claims (553 claims denied)**

    a. **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.

    b. **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.

    c. **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.

2. **Code 220: 8 Months or Less of SGA (322 claims denied)**

    - 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.

3. **Code 320: 9 Months of SGA But Not Within 12-Month Period (318 claims denied)**

    - 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.

Question and Answer Session

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

Upcoming WISE Event

Jocelyn Greenidge (TPM)

Jocelyn announced that the next Work Incentives Seminar Event (WISE), “Find Work That Works for You,” takes place on October 28 from 3 to 4:30 p.m. ET.