QUARTERLY ALL VR CALL TRANSCRIPT OCTOBER 13, 2026

Jocelyn Greenidge (TPM): Hello, and good afternoon. Thank you all for joining the quarterly All VR Call. My name is Jocelyn Greenidge. I'm the TPM Senior Program Director. I will be serving today as the moderator for the call.

Before we begin with our agenda and presentation, I would like to advise that this call is scheduled for 60 minutes.

Today we have a fantastic agenda to share with you. We will first go over the welcome, logistics and housekeeping; followed by announcements, then, Ticket Portal enrollment reminders. We will also go over some troubleshooting for Ticket Portal issues and acceptable signature reminders. We have a VR Outreach announcement and information on Section 301 claims, followed by the top three payment denials. After that we will close with any questions and answers, followed by our updates for our next WISE event. Next slide, please

I want to let you know that this call is being recorded and transcribed. All post-call items will be available on the yourtickettowork.ssa.gov website in a few weeks. Also, participants are not permitted to record or capture the transcript from this call. MS Teams chat is not activated for today's call. To ask a question during the Q&A portion, please click on the raise hand icon at the top of the MS Teams window. You will be given audio access by a member of our production team. At that time, they will click the mic to unmute, and you can ask your question. If joining by phone, please raise your hand and press star five. A member of the production team will provide audio access and please press star six to unmute and ask a question. I will also reiterate these instructions right before the Q&A.

I ask you to please keep the questions to one each time you are called upon. Additional questions or comments may be sent to the VR.Helpdesk@ssa.gov. Any question not answered during the live event will be forwarded to the appropriate panelist for comment. In addition, closed captioning is available via MS Teams and via a closed captioning link. You may also activate live captioning in MS Teams by clicking *More* at the top of the MS Teams screen and *click Language and Speech*. Next, click on *Turn on Live Captions*. To use the link option, copy the link from the GovDelivery message and paste it into the browser to view closed captioning.

Next, we will go over our announcements and reminders.

I would like to let you know that on October 6, SSA distributed information about the updated cost formula for the Federal fiscal year 2027. The formula applies to the period from October 1, 2026, through September 30, 2027. VR agencies may use the formula to calculate their average

monthly administrative counseling and placement costs, commonly referred to as the ACP costs. SSA uses an acceptable average monthly ACP cost before processing reimbursement claims. The key deadline is Friday, February 26, 2027. Please submit your agency's ACP costs by that date. Again, the date is Friday, February 26, 2027. If additional time is needed, please contact the VR Help Desk for any consideration. When submitting the costs, please follow the submissions instructions in the October 6 communication and retain the supporting documentation used in the calculation. Next slide, please.

We will go over the Ticket Portal enrollment reminders. I'm going to review with you the Ticket Portal reminder enrollment process, particularly the distinctions between receiving suitability clearance and being enrolled as a user. VR staff must complete three requirements to gain access to the Ticket Portal: attain suitability clearance, create a personal *my* Social Security account with advanced security, and receive authorization from SSA. Suitability clearance alone does not provide Portal access. So, after receiving your suitability letter, the staff member must email the VR Help Desk and request enrollment. SSA will complete the enrollment as a new user. The VR Help Desk will verify that the individual has a *my* SSA account. Staff are encouraged to use their personal email address because this is an individual personal account. However, please do not share the Ticket Portal link, or screenshots with any unauthorized agency or staff members who are not authorized to use the Portal, until SSA has enrolled them. After enrollment, SSA will send the new user a welcome letter containing the Ticket Portal link.

At this time, we will now have Alexis Thomas, who will go over how to troubleshoot Ticket Portal issues.

Alexis Thomas (SSA): Good afternoon, everybody.

These next slides are about reporting Ticket Portal issues. SSA relies on the VRs as Portal users to report Portal issues, as well as work with us in testing when fixes are made. SSA staff cannot access the live Ticket Portal, so we have to go back to our Portal users for additional information and to confirm the fixes have worked. The promptness in responding to emails helps us move Portal issues to our systems team and helps resolve them faster. Most Ticket Portal issues can be resolved by taking the following steps: First, you would clear your browser history and cache. Then, the best option is to copy and paste the Portal link that was provided in your welcome letter, which was emailed to you when you enrolled in the Portal. If you rely on the shortcut on your desktop, or favorites on your browser, it can be pointing to a broken link. So, we always suggest that you freshly grab the link from your welcome letter. If you have another browser available, try using another browser. For example, many people use Edge, but if Edge is not working, we suggest trying a different browser, such as Chrome. If there is no change and you're still having the Portal issue, please restart your computer.

If your issue has not been resolved by taking the steps that were mentioned on the previous slide, reach out to the VR Help Desk and provide the following information: VR PID (it helps us

find your VR more quickly in our system), list the troubleshooting steps that you performed from the previous slide, the browser and the browser version that you're using (sometimes browser updates occur on the VR side 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. Sometimes there are multiple ways to access certain Portal screens, and we need to be able to recreate your steps. Please also include a screenshot of the error message. Providing us with all this information assists us in getting to your issue faster. When we reply back, please respond back as promptly as you can so we can resolve all the issues that you may be having. We obviously hope there are no issues, but things do happen. So, please refer to these slides in the future if you have Portal issues. Thank you. Jocelyn, back to you.

Jocelyn Greenidge (TPM): Thank you, Alexis.

At this time, I will go over acceptable signatures. The acceptable signatures that SSA will accept on an Individualized Plan for Employment (IPE), or the SSA - I99 form are the following signatures: wet signatures, DocuSign signatures, time/date stamped signatures, /s/ + typed signatures, cursive font type signatures, and PIN with attached statement.

Please note that SSA made temporary exemptions during Covid by accepting an email, a phone call, or proof of commitment from a client of their intent to sign an IPE. However, SSA no longer accepts those signatures as valid. So, again, the only acceptable signatures are wet signatures, DocuSign signatures, time/date stamped signatures, /s/ + typed signatures, cursive font type signatures, and pin with attached statement.

At this time, I will be going over VR Outreach.

Please note that SSA is conducting a courtesy outreach when additional information or follow-up is needed for a pending VR claim. State VR agencies may receive an email from VR.pending@ssa.gov. The subject line will follow this format, VR CR Request for Documentation. Followed by the PID# and SSA Reference Number. This message will identify the document that SSA needs. For example, it may include an updated IPE with necessary signature(s), case notes, or proof of payment. Agencies should submit the requested information by fax using a Ticket Portal generated fax cover sheet. From the main menu, select *View all VR Pending Payments For Me*, type the SSA reference number from the VR Outreach email in the search bar, select *Actions*, click *Fax Additional Information*, select the corresponding document type and generate the fax cover sheet. Follow the directions printed on the fax cover sheet. After sending the fax, check to make sure that the fax was sent. Again, this courtesy outreach will be sent by VR.pending@ssa.gov. Please remember that you are responsible for all original documentation due date.

Again, this slide reiterates the outreach that you may receive.

At this time, we will now have an update from Section 301 claims from Shada.

Shada Roper (SSA): Good afternoon, everyone.

We're giving you the background and eligibility, who qualifies for Section 301 claims, determination on how a 301 claim is made and documented, the process and roles for 301, Office of Disability rules, the 301 mailbox and who does what, reviewing the claim in iTOPSS, screen-by-screen walk through of 301 payment, and your resources and contacts for claims having to do with 301 claims.

Section 301 (20 CFR 404.2112) Payment for VR services when an individual continues to receive disability payments based on participation in an approved VR program. The benefits continue for an individual whose disability has ceased and may continue to receive disability because of continued participation in an approved VR program. A VR agency can be paid for costs of VR services if the individual was receiving benefits in a month (or months) after October 1984. For the payment period, services must be provided within the period specified in 20 CFR 404.2115, subject to other payment and administrative provisions of the subpart. Next slide.

Who's eligible for 301? Individuals whose benefits are based on disability or blindness. For Title II Social Security Disability Insurance (SSDI), this includes Disability Insurance Benefits (DIB), Disability Widow(er)'s (DWB), Childhood Disability Benefits (CDB) and Career railroad workers and/or Railroad Retirement Board annuitants. Under Title XVI Supplemental Security Income (SSI), those are recipients whose benefits are based on disability or blindness and age 18 recipients whose disability is found to have ended because of the age redetermination. Minors or children under 18 are also eligible. Individuals with an Individualized Education Plan (IEP) must be between the ages of 18-21.

Eligibility requirements and when they end. This applies after medical cessation or age 18 ineligibility determination. They must meet all of these: participate in a VR program, employment, or 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 that will no longer increase the likelihood of the individual coming off Social Security rolls. This does not apply when the medical cessation is due to failure to cooperate, or whereabouts unknown.

Next, I will discuss how the process begins for medical cessation to 301 determination. The DDS Office finds the disability has ceased. The Disability Determination Services determines the disability or blindness has ceased. The Office of Disability makes a 301 determination. The Office of Disability Operations decides the initial and continuing 301 eligibility. The Disability Examiner (DE) specifies the 301 determination in item 29 of Form SSA-833 form. That's for Title

II and for Title XVI, it would be Form SSA-832. The DE sends the 301 determination information and supporting forms to the VR.301.claims@ssa.gov This information is vital for 301 claims processing and understanding that once you've submitted a 301 claim, a Continued Disability Review (CDR) can take up to 24 months. So, the claim could be in queue for up to 24 months.

This is Form SSA-4290-F5 from the SSA Field Office that some VRs receive for 301 claims. When stating that you have a possible 301 claim, there is a possibility of payment for a 301 claim.

Next, I will discuss roles and responsibilities as far as processing 301 claims. VR Policy Team Analysts monitor the 301 mailbox (VR.301.claims@ssa.gov) for incoming 301 claims with supporting documents and forms, such as Form SSA-4290-F5, 553, and the 833 approved by the DE from the Office of Disability. The Policy Team Analyst reviews the forms and sends 301 notice forms and 301 letter by email to the VR agency. The Policy Team Analyst waits for a response from the VR stating whether the individual was in an approved VR program. Sometimes they are not and it's okay; therefore, we receive an email that says they were never in a VR program, or they continue with the 301 claim process, and the SSA reference number is sent back via email once they have filed and uploaded a 301 claim. The Policy Team Analyst reviews the claims for 301 processing using all systems and necessary documentation to determine whether it is a payment for 301, or a denial. Again, please note, it could take up to 24 months for this entire process.

This is the process and flow chart. First, it's sent by a DE to the 301 mailbox (VR.301.claims@ssa.gov). Second, the SSA Analyst emails the 301 notice, along with the 4290, to the SVR involved. Third, the SVR responds with a Work Case number from the Ticket Portal or answers “no”, the person was not an approved VR program. Fourth, if the work case has been submitted, SSA evaluates the work case and SSA keeps the claim in the processing queue awaiting DIB cessation or termination. So, we have to wait for the disability to term or cease, and we will receive something from our Office of Disability or that they have been terminated from our Social Security rolls before any continued processing for payment. If they have not been terminated, then after the 24 months, there would be a denial to say that their medical or disability did not cease. SSA monitors the claim and records the information for up to two years. Five, once the two-year period has passed, the claim is processed completely. We do try to give you time as we're awaiting information from our Office of Disability to say that this person’s disability has ceased or terminated. We wait as long as possible so that we can make an accurate payment decision and one that is very advantageous to the VR agency.

Next, is the 301 medical adjudication process. When the claim is received, there should be an SVR remark that says 301 claim. Sometimes VRs say that they found out information from the Field Office that this is a 301 claim, received email from Shada to file a 301 claim. As you can see, we still follow all the requirements that we do for any kind of VR work case. Therefore, the net payment period matters. In the example on the slide, you have the net payment period start date and the net payment period end date. You see the gross payment period start date

and the gross payment period end date. The highlighted sections show the 301 allowance date that we receive from the Office of Disability that states it was an approved 301 case.

Next slide, please. We review the record as shown to make sure that you have the proper claim type. So therefore, it should be a claim based on Medical Recovery During VR for 301 claims. We would prefer that you do select the Medical Recovery During VR (301) radio button to prevent your claim from being denied based on SGA because this is a claim that has nothing to do with SGA, but it is completely based on medical recovery. That's also why we request that you put a remark in the Remarks section in case you don't click Medical Recovery as your radio button. Our team will know that they need to forward this 301 claim to a Policy Team Analyst, usually myself, so that the claim can be processed accurately, knowing that it is not an SGA claim. As you can see, in this slide it has the Payment Status Code: T31. We know that the claim has been terminated and therefore medical recovery was involved. There was no SGA, but the claim has been terminated. This individual is now pretty much removed from our rolls.

As you can see on this slide, they were first in DIB CESS, and they were in DIB CESS for a long time. Then the Office of Disability terminated the claim because they were no longer a Social Security recipient. If you look at the bottom of the record, you will see the note from the Office of Disability that this is a 301 claim, and it has been approved for 301. We have the date that it was approved for 301.

We then look at the section that you enter the information on your part as the SVR, which are the costs that you're requesting and the occupation that's based on medical recovery. And everything that you would've had on your screen to input the information.

Once again, we're at the payment screen. We have highlighted the net payment period and the gross payment period. We also highlighted in the section the payment you receive, so it's different from the costs that you requested, only because this is once again based on medical recovery. Can we go back two slides where we saw where we had to stop at the time where they were in DIB CESS? So therefore, you're not receiving all the ACP requested due to the fact that prior to termination they were in DIB CESS. They have been in DIB CESS since 2023 and that's where we based our net payment period and that's what reduced the ACP costs that were requested. And if you could go back to the payment slide, the payment was reduced having to do with the ACP costs. All the reimbursable costs were approved. Next slide.

Now we have a 301 claim based on just DIB CESS. So, they have not been terminated at this moment, but the DIB CESS is what leads the Office of Disability to terminate the record or the Field Office in a case of SSI. SSI is usually done by the Field Office, whereas the Disability Office does DI. At this moment because this is an SSI claim, they are in DIB CESS.

On this slide you can see the DIB CESS months. Note that the DIB CESS month started in 9/2024.

The DIB CESS started in 9/24, and it will affect your net payment period. So, again we highlighted the net payment period. We included some of the costs because some of the costs were outside of that net payment period having to do with the DIB CESS. The DIB CESS was 9/2024, and we've had costs for 1/25 and those were not approved. This will affect the payment request. So therefore, the request for payment is not going to be all approved.

As you can see on this slide, the total costs are on the left. When you look at the right, the reimbursable costs are significantly less. Why? Because we could not approve certain months of payment due to the fact that there was DIB CESS. We approved what was inside of the net payment period and so your payment has been reduced. However, there was a payment received.

If there are any 301 claim questions —because these are very complex claims and they do take a lot of waiting, please contact the VR Help Desk. They are done through our Office of Disability and our Field Office, so they start in our Field Office and end with the Office of Disability and all their determinations unless they're Title XVI. These examples were examples of Title XVI only. However, we do have Title II 301s and we do have concurrent 301s. We have concurrent claims and they have to be terminated on our Title II record and our Title XVI record or DIB CESS on our Title XVI and Title II record. We have to wait for that to be able to make some kind of determination. That's part of the reason why it takes up to 24 months. Your 301 claim questions should always go to the VR Help Desk. The 301 mailbox, and myself, Shada at shada.t.roper@ssa.gov If there are any questions having to do with 301 claim processing, after you receive the Form SSA-4290-F5 and a letter explaining the 301, and to file a claim, you can always email me directly with any questions about processing the 301, or what you need for the 301 claim. We have our Help Desk, that's always the first start, a 301 mailbox and then at any point in time you can always email me directly. Thank you. And back to Jocelyn.

Jocelyn Greenidge (TPM): Thank you, Shada. Thank you so much for all the information.

Moving on to the next slide, please.

Now we will go over the top three denial reasons for the third quarter.

The top three denial reasons were Denial Code 620, untimely filing for initial claims, Denial Code 220, eight months or less of SGA and Denial Code 320, nine months of SGA but not within a 12-month period.

For Code 620 payment denial, this most frequented denial showed for the untimely filings with 553 denials. For the 620, I wanted to let you know that this applies when the claim is filed more than one year after the last month of SGA. So, to avoid this denial please review the earnings on the Vocational Rehabilitation Client Earnings Report (VRCER). Please ensure the claim is filed no later than one year after the final SGA month.

In addition, for an earnings-related reconsideration, Code 620 applies when the reconsideration is filed more than one year after the initial claim decision date. Use the date on the original notice of determination to calculate the filing deadline. The reconsideration must be filed within one year of that decision date.

Next slide, please. For non-earnings reconsideration, which is untimely filing, this deadline applies to non-earnings related to reconsiderations. These must be filed no more than 90 days after the initial claim decision date. Please review the reason for the original denial and use the correct deadline.

The next denial concerns the amount of verified SGA levels, which would reflect in SSA's records.

On to the next denial code reason, which was 220, which is payment denial. Code 220 means SSA found eight months or fewer of verified SGA level earnings. If an initial claim was denied because of insufficient earnings, wait an additional two calendar quarters before submitting a reconsideration to reduce the risk of another Code 220 denial. Please submit proof of earnings with the claim, which acceptable documentation may include VRCER, OCSS data, Work Number, pay stubs, or an Employee Signed Statement that includes FICA withholdings.

Next is denial code for 320. This applies when there is evidence of nine months of SGA, but those months extend beyond the required 12-month period. So please, before filing, review the earnings month by month and confirm that the nine-months cited in the claim fall within the one qualified 12-month period. To reduce these three types of denial reasons, please review to make sure there's enough SGA months verified and also that those months fall within the required time period.

We will now move into the question-and-answer sessions for today. As a reminder, to ask a question if you're over the phone, please raise your hand by dialing Star five. You will be unmuted by the facilitator, or support staff. Then press Star six to unmute yourself. If you are asking a question by MS Teams, please raise your hand by selecting the raise hand icon in MS Teams. Your mic will be unmuted and then you will be able to unmute yourself. Again, I ask at the time that you're asking your initial question, please hold it to one question at a time. If we're unable to get to any of the questions, you can submit additional questions to VR Help Desk. At this time, I would like to go to Emani to see if we have any questions.

Emani Cain (TPM): Thanks, Jocelyn. Yes, we do have one question from Eugenia. You have audio access; you can unmute and ask your question.

Eugenia (SVRA): Hello. My question is for Shada. Thank you again for the detailed explanation on the Section 301 claims. Now I know why you were a school teacher, Shada. I'm trying to make sure I understand this because I've been doing this for 20 years and I've never received a Section 301 claim. So, I'm assuming it's a manual entry claim in the Portal and I'm assuming the

only way you're going to be sending a 301 claim is if we have notified you that we're working with them on the end user Portal or they have a Ticket assignment. If we do have a Section 301 claim, we'll get notified by you. Is that correct, Shada?

Shada Roper (SSA): Hi, Eugenia, thank you very much. Most of the time it comes from your Field Office, so it starts with the Field Office. But if the Office of Disability notifies me through the 301 mailbox that you have a 301 claim, then I reach out to you with our 301 notice, in addition to a 4290 to say that this is a possible payment claim for 301. However, when you're thinking about Ticket, the IEP matters because a lot of times these are SSI claims and these are youth involved and that's how the 301 began. So therefore, having to do with the Ticket, that's not always the case. At this time, I'm in the middle of waiting on a claim that is a concurrent record and that one is involving a Ticket. But a lot of times it's not involving a Ticket with youth involvement.

Eugenia (SVRA): Okay. I'm just trying to figure out [why] we won't just know. Are we going to be notified by a Field Office, which I don't know that we ever have been?

Shada Roper (SSA): Sometimes you can be. So, the particular claim that I'm waiting on, the state contacted me to say the Field Office told them that it was, and I requested that the state submit a 301. I looked at the record and there was information on their record that said there's a possible 301 because it starts with that Field Office. In between that, the Office of Disability contacts me through the 301 mailbox and then I contact you to say that they gave me this person. Are they a recipient of VR?

Eugenia (SVRA): Okay. If the Field Office is contacting somebody, will it probably be the counselor? We have to know how it's going to get to us.

Shada Roper (SSA): I have no idea how the Field Office contacts you. The state just made me aware that a Field Office contacted them. If a Field Office contacts you and says, a 301 is involved, that's pretty much the gospel because if they say it, they will know first. I'm not sure exactly who from the Field Office contacts you. But I do know that once they are in an approved VR program, when a claimant is receiving SSA benefits, they do fill out that 4290 F5 to say that they're participating in an approved VR program and they could be a part of a 301 program. But it's usually where youth are involved.

Eugenia (SVRA): Okay. I'm just trying to get an idea of the flow of where it's going to come from, if it comes at all.

Shada Roper (SSA): It will be your Field Office telling you. I just do not know if it's the counselor. I don't know how it goes from the Field Office. I'm guessing since the counselors would be the first contact, that it would be somebody from their team. I know our local Field Offices do contact the VRs to say there's a 301 involved.

Eugenia (SVRA): Okay. Thank you, Shada.

Shada Roper (SSA): You're welcome, Eugenia. Thank you.

Jocelyn Greenidge (TPM): Thank you, Eugenia. Thank you, Shada. Emani, do we have any more questions?

Emani Cain (TPM): Yes, we do have one from Donna Osborne. You have audio access so you can unmute yourself and ask your question.

Donna Osborne (SVRA): Hi, this is Donna from Kentucky VR. I just wanted to get some clarification about the acceptable signatures on the IPE. You said that you allowed an email because of Covid; email agreement. But you would no longer be accepting those. What if we're looking at an IPE that was signed during that time frame?

Chauna Dixon (SSA): This is Chauna Dixon. I'm one of the Senior Analysts on the team. If it was during the time frame that we were accepting those particular signatures, then it will still be accepted but it would have to be during that time frame. Okay? I'm not really sure. Renee may know when the actual time ended. But it would have to be during that time that email signatures were being accepted for Covid reasons.

Donna Osborne (SVRA): Okay. Thank you.

Chauna Dixon (SSA): Thank you. Sure.

Renee Clarke (SSA): Hi, this is Renee. Just to follow up on what Chauna said. If you have a signature that's accompanied by an email, and you're wondering whether or not to accept it, feel free to send it to the VR Help Desk and we can advise you further.

Jocelyn Greenidge (TPM): Thank you.

Renee Clarke (SSA): Thanks.

Jocelyn Greenidge (TPM): Thank you for your question. Hi, Emani. Do we have any additional questions?

Emani Cain (TPM): Hey Jocelyn. There are no more raised hands at this time.

Jocelyn Greenidge (TPM): Thank you. Well, if there are no additional questions, I would like to go to the next slide, please.

And again, if you do have questions after the call, you can always email us at the VR Help Desk as well. Those questions will get routed to the appropriate person for answers.

At this time, I do want to remind you of our next upcoming event, which is the WISE (Work Incentive Seminar Event. The topic will be “Find Work That Works for You”. This will be held on October 28, from 3:00 to 4:30 p.m. ET. The Ticket Program will distribute important services and notices, including the Ticket Portal issues through GovDelivery messages. We will also share

how to join our next WISE via GovDelivery as well. If you have any questions, again, please reach out. Please save this email, tickettowork@subscriptions.ssa.gov. We hope to see you on the next WISE event.

At this time our next All VR call has not been scheduled. But as soon as it is, we will send out a message. However, until that time, if you have any topics or suggestions that you would like for us to cover, please email them to VR.Helpdesk@ssa.gov.

Once again, thank you for your time today, for joining the call. Thank you, Shada and Alexis, for your updates and presentation. Thanks, SSA and all of you for joining.

Have a good afternoon.