

7/23/2020



Social Security's Ticket to Work

Submitting Successful Claims to Improve Cost Reimbursement (CR) Allowance Rates



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Submitting Successful Claims to Improve CR Allowance Rates

Sponsors

- Social Security Administration, Office of Employment Support (OES)
- Council of State Administrators of Vocational Rehabilitation (CSAVR)
- National Council of State Agencies for the Blind (NCSAB)

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Submitting Successful Claims to Improve CR Allowance Rates

Speakers

- Rob Pfaff, Director, Office of Employment Support (OES), Social Security Administration (SSA)
- John Connelly, Director of Research and Grants, CSAVR
- Shada Roper, VR Policy Analyst, OES, SSA
- Eric Schmidt, Program Manager Social Security Programs, Maryland Division of Rehabilitation Services (DORS)
- Kyle Beeson, Staff Specialist for Program Income, Maryland DORS

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Speakers (continued)

- Annie Zaffrann, Reimbursement Coordinator, Texas Workforce Commission
- Ann Lynn Banton, SSA and Ticket to Work Coordinator, Virginia Department for the Blind and Vision Impaired (DBVI)
- Arlene Lugo, Program Director, Connecticut Vocational Rehabilitation Agency
- David Leon, Deputy Director Workforce Programs, Virginia Department for Aging and Rehabilitative Services (DARS)
- Sue Tietjen, Cost Reimbursement Specialist, Virginia DARS

Introduction with Rob Pfaff and John Connelly

Cost Reimbursement Claims Checklist

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Cost Reimbursement Claims Checklist



Know and include evidence of the client's earnings



Include all pertinent information and evidence with claims and reconsiderations



Ensure the client status is "In Use SVR" and not assigned to an Employment Network (EN)



Have Form 199 ready when submitting for multiple reimbursement categories

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Know and Include Evidence of the Client's Earnings

- Check to ensure the client has 9 out of 12 months at or above Substantial Gainful Activity (SGA) level earnings
 - Use the latest VRCER from Social Security or your state's systems to verify
- Acceptable proof to send includes paystubs, an employer signed statement with FICA withholdings or a printout from the work number
- If Social Security cannot find 9 months of earnings, they will deny the claim under code 590

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Include All Pertinent Information and Evidence with Claims and Reconsiderations

- If a claim is a possible transitional work case, send a signed copy of the client's Individualized Plan for Employment (IPE) showing how the state VR was involved
- REMEMBER: State VRs can only submit a reconsideration one time, so be sure to include as much information as possible when resubmitting
- Include remarks to provide all the case context:
 - Date of initial denial
 - Denial code
 - Comments from Help Desk if you contacted it

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Ensure the client status is “In Use SVR”

- Does the client have their Ticket assigned to your state?
 - If yes, make sure the status is “In Use SVR”
 - If the client is not assigned to a state VR (“In Use SVR” status) and is a current Ticketholder working with an EN, you cannot make the claim under the regular Cost Reimbursement system
- You can check your state’s system to verify the client’s status

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Have Form 199 ready when submitting for multiple reimbursement categories

- For claims that include multiple categories such as transportation costs and service animal costs, fill out and fax Form 199 through the Ticket Portal
- You can find Form 199 at <https://www.ssa.gov/forms/ssa-199.pdf>
- Social Security recommends this instead of filling in fields directly. Its system will sometimes time out for claims that take longer to fill out and you may lose your information

SOCIAL SECURITY ADMINISTRATION
FORM 199-REV 03-10
OMB No. 0960-0310

VOCATIONAL REHABILITATION PROVIDER CLAIM

To: Social Security Administration
Office of Employment Support Programs
VRA Operations Team
P.O. Box 17714
Baltimore, Maryland 21235-7714

From: [Redacted]

VR Provider Code: [Redacted]

Check One Claim Based On: Continuous Period of SGA Medical Recovery during VR

If claim is based upon other than a continuous period of SGA, it is not necessary to complete items 6, 8, 9, or 13 below.

Check One Initial Claim Reconsideration Recubital Supplemental

1. Client (First Name, MI, Last Name)
[Redacted]

2. SGA SSI SSN (Primary) 3. SSN (Widow or child, if appropriate) 4. Blind Non-Blind

5a. Date Client Entered VR 5b. Date signed IPE 6. Date Employment Began 7. Date of Final VR Closure 8. Months Work Activity Tracked After VR Closing (show months)

9. Medical services were provided, initiated, or coordinated under IWRP Yes No

10. Claim based solely on extended evaluation services (VR 06) Yes No

11. Direct cost during VR (after 9/30/81) -- Total from Item 17d (over) \$ [Redacted]

12. Administrative, counseling and placement costs during VR (after 9/30/81) \$ [Redacted]

13. Administrative costs only for tracking after VR (after 9/30/81) \$ [Redacted]

14. Other (Identify in Remarks section below) \$ [Redacted]

15. Total amount claimed \$ [Redacted]

16. What type of occupation(s) did the client perform during the continuous period of SGA:
Remarks:
[Redacted]

Signature: [Redacted] Title: [Redacted] Date: [Redacted]

Form SSA-199 (03-2010) EF (03-2010)
Destroy prior editions

CONTINUED ON REVERSE SIDE →

Submitting Successful Claims to Improve CR Allowance Rates State VR Agencies Share Their Tips

Eric Schmidt and **Kyle Beeson**, Maryland DORS

- Processes on the front end to include data validation and integrity before submitting a claim
 - Data validation on intake
 - Starting off right: case management once data is validated
 - Data validation during and after a case

Submitting Successful Claims to Improve CR Allowance Rates State VR Agencies Share Their Tips

Annie Zaffrann, Texas Workforce Commission

Ann Lynn Banton, Virginia DBVI

- Tracking and wage verification tools and processes
 - Check your benefits system
 - Check your wage database
 - Review case notes from case management system

Common Earnings Denials

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Common Earnings Denials

- 1 8 months or less of SGA-level earnings
- 2 Earnings less than SGA-level
- 3 9 months of SGA-level earnings, but not within 12 months
- 4 Earnings not found

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8 months or less of SGA-level earnings

- You have SGA-level earnings, but not the 9 months out of 12 to satisfy the requirement
- Codes:
 - 220 for non-blind SGA
 - 225 for blind SGA

Submitting Successful Claims to Improve CR Allowance Rates Earnings less than SGA-level

- You have earnings, but not high enough to meet the SGA-level threshold
- Codes:
 - 210 for non-blind SGA
 - 215 for blind SGA

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9 months of SGA-level earnings, but not within 12 months

- You have 9 months of SGA-level earnings, but over a period longer than 12 months
- Codes:
 - 320 for non-blind SGA
 - 325 for blind SGA

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Earnings not found

- Social Security cannot find earnings on their system, which in some cases, is not as up to date as a state's VR system
- Include evidence of earnings for the claim you submitted in your reconsideration
- Code 200 for non-blind and blind

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Annie Zaffrann, Texas Workforce Commission

- Resubmit claims with at least 2 new quarters of wages
- When all Notice of Denials (NODs) are received for a month, send an email to Social Security with a spreadsheet of all the denials you are questioning

Vocational Rehabilitation Client Earnings Report



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Vocational Rehabilitation Client Earnings Report (VRCER)

- Social Security sends a VRCER quarterly through email for any clients the state VR agency has had since 2015
- The email goes to the point of contact the state VR agency designates in the initial VRCER request form
- Each report looks at the past 8 quarters
- A VRCER uses letter codes to signify the level of earnings for each quarter

Submitting Successful Claims to Improve CR Allowance Rates State VR Agencies Share Their Tips

David Leon and Sue Tietjen, Virginia DARS

- CSAVR Workgroup
 - What is the Workgroup?
 - Monthly meetings
 - Examples of trainings conducted
 - Dedicated webpage

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Ann Lynn Banton, Virginia DBVI

Arlene Lugo, Connecticut Vocational Rehabilitation Agency

- The value of submitting claims from a state VR agency for the Blind
- Benefits of the CSAVR Workgroup

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Questions?

Dial ***1** to add yourself to the queue for questions

Dial ***2** to remove yourself from the queue if your question has already been answered