

# Social Security Administration VR Cost Reimbursement Overview



Securing today  
and tomorrow

[SSA.gov](https://www.ssa.gov)

# Logistics

- **This call is **not** being recorded and transcribed.**
  - Participants are not permitted to record this meeting nor capture the transcript.
- **During the Q & A Session:**
  - Chat is not available to post questions. You must ask your question aloud.
  - Please limit questions to the topic(s) presented in each section.
  - If you wish to ask a question, click the raise hand icon, and the Facilitator will provide access to audio to allow you to unmute your microphone.



# Logistics, *Cont.*

- **Please ask one question each time you are called upon by the Facilitator.**
  - Additional questions or comments can be sent to:  
**[VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov)**
  - Those questions not answered during the live event will be forwarded to the appropriate panelist for comment.
- **Closed Captioning:**
  - **Teams:** 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.”
  - **Link:** Paste the link in the browser and it will open in a separate window to view Closed Captions.



# Policy, Eligibility, and General Requirements



Securing today  
and tomorrow

# SSA Policy

Under SSA's Vocational Rehabilitation Cost Reimbursement Program, we reimburse State VR agencies for the costs of the services they provide to beneficiaries with disabilities, if such services result in the person achieving work at a specified earnings level.

Did the direct services lead to the earnings?



# Eligibility and General Requirements for Cost Reimbursement

- Beneficiary must be entitled to disability or blind benefits during the period of VR.
- Beneficiary must have a continuous (9 out of 12 months) period of substantial gainful activity (SGA) or be medically recovered and participating in an approved VR program.
  - SGA is a level of work and earnings reviewed on a monthly, quarterly and yearly basis.
- Services rendered by the VR must be reasonable and necessary.
- VR must have an approved Cost Formula.



# Continuous Period of SGA (CP of SGA)

- Beneficiary must have 9 out of 12 months of substantial gainful activity:
  - 9 of 9  
 $9 + 0 = 9$  months
  - 9 of 10  
 $9 + 1 = 9$  out of 10 months
  - 9 of 11/12 months  
(Includes a 2 to 3 months break. The break must not be due to the beneficiary's disability.)



# Requesting Cost Reimbursement via the Ticket Portal

The Ticket Portal is a web-based application that VRs use to submit reimbursement claims, generate a fax coversheet to submit required documentation, and to check the status of a Ticket.

There are two ways to request cost reimbursement in the Ticket Portal:

- Enter the SSA-199 information via a screen one SSN at a time
- Upload an XML file containing one or more SSN(s)



# VR Cost Reimbursement Claims



Securing today  
and tomorrow

# Types of Claims for Reimbursement

- Initial Claim – Claim submitted for reimbursement for a disabled or blind beneficiary.
- Reconsideration Claim – Claim submitted that was previously denied.
- Supplemental Claim – Claim submitted for cost omitted from a previously paid claim.



# Timeframes for Submission of Claims



Securing today  
and tomorrow

# Timeframe for Filing Initial Claims

A VR agency has 12 months after the 9th month of SGA to file a cost reimbursement claim with SSA.

Example: If the 9<sup>th</sup> month of SGA is attained in March 2023, the claim must be submitted to SSA by March 2024.

If the filing deadline is not met and cannot be waived for “good cause,” the claim will be denied.



# Timeframe for Filing Reconsideration Claims

- A VR is allowed to file only one reconsideration for any claim that was denied due to earnings. The reconsideration claim must be filed within 365 days from the initial decision date.
- A VR is allowed to file only one reconsideration for any non-earnings claim denial within 60 days from the decision date.



# Timeframe for Filing Supplemental Claims

- A VR has 365 days from the date the initial claim was paid to file a supplemental claim.
- The costs requested should be within the initial claim's payment period.



# Criteria for Processing a Claim

- Benefit Status
- Earnings Analysis
- Final Adjudication



# Benefit Status

- SSDI - Beneficiary must be at least 18, entitled to disability benefits, and in current pay or suspense during the VR Period.
- SSI - Beneficiary must be at least 16, entitled to disability benefits, and in current pay or non-pay status during the VR period.
- SSDI/SSI Concurrent - Beneficiary is entitled to disability benefits on both records during the VR Period.



# Earnings/SGA Analysis

- Substantial Gainful Activity (SGA) is a level of work and earnings reviewed on a monthly, quarterly and yearly basis.
- SGA levels are based on the beneficiary being statutory blind or non-blind.
- The specific SGA level for each year is determined by SSA.



# SGA and SSI Amounts

Non-Blind				Blind				SSI AMOUNT	
Year	Monthly	Quarterly	Yearly	Year	Monthly	Quarterly	Yearly	Year	Amount
2020	\$ 1,260	\$ 3,780	\$15,120	2020	\$ 2,110	\$ 6,330	\$25,320	2020	\$783
2021	\$ 1,310	\$ 3,930	\$15,720	2021	\$ 2,190	\$ 6,570	\$26,280	2021	\$794
2022	\$ 1,350	\$ 4,050	\$16,200	2022	\$ 2,260	\$ 6,780	\$27,120	2022	\$841
2023	\$ 1,470	\$ 4,410	\$17,640	2023	\$ 2,460	\$ 7,380	\$29,520	2023	\$914
2024	\$ 1,550	\$ 4,650	\$18,600	2024	\$ 2,590	\$ 7,770	\$31,080	2024	\$943
2025	\$ 1,620	\$ 4,860	\$19,440	2025	\$ 2,700	\$ 8,100	\$32,400	2025	\$967



# Payment and Denial Codes



Securing today  
and tomorrow

# Final Adjudication of Claims

- Payment
- Denial
  - Technical denial
  - Earnings denial
- Pending



# Payment Codes

- 900 - Initial Claim
- 910 - Medical recovery (301)
- 940 - Reconsideration
- 950 - Savings to the trust fund
- 990 - Supplemental Claim
- 690 - Adjustment Code



# Technical Denial Codes

- 040 - Benefits Denied
- 060 - Benefits for reasons other than disability or blindness
- 070 - Benefits began after VR services ended
- 080 - Benefits ended before VR services began



# Commonly Used Earnings Denial Codes

- 290 - VR Services did not contribute to the late start of SGA
- 400 - Ticket is not assigned or assigned to an EN
- 610 - Payment would result in a net savings to the trust
- 620 - Untimely filing due to the CP of SGA or reconsideration
- 621 - Maximum number of reconsiderations filed for the same VR Period
- 650 - VR did not provide requested documentation timely
- 700 - Duplicate or overlapping VR period for a previously paid claim
- 730 - Costs requested were not within the payment period



# Pending Claims

## Reasons a claim may be pending:

- Late start of SGA
- One or more costs are outside of the Payment Period
- Pre-Payment Validation Reviews (PVR) and Post Validation Review
- The cost formula is needed for the current fiscal year, system issues and SAM registration expired



# Transitional Work and Payment Periods



Securing today  
and tomorrow

# Transitional Work

Transitional Work is work that results in earnings within 12 months after the VR closed the case.



# Transitional Work Example

(CP of SGA: 01/2014-09/2014)

Earnings are found within 1 year after VR closure date 1/2012

VR information sample sheet- Dates of VR period and SGA sample

VR Enter Date	IPE Date	Employment Date	VR Closure Date
09/20/2009	11/15/2009	12/12/2013	1/10/2012

In this scenario claim has transitional work and is PAYABLE! as long as all other reimbursement requirements are met:

03/2012	08/2012
\$400	\$0
04/2012	09/2012
\$600	\$0
05/2012	10/2012
\$800	\$0
06/2012	11/2012
\$ 1200	\$0
07/2012	12/2012
\$0	\$0



# No Transitional Work

- If the beneficiary **is not** working within 12 months after the VR closed the case, SSA sends out a notice requiring documentation from the VR.
  - Documentation consists of the signed Individualized Plan for Employment (IPE), case notes, and any other justification the VR provides for the late start of SGA.



# No Transitional Work

(CP of SGA: 01/2014-09/2014)

Earnings are not found within 1 year after VR closure date 1/2012)

01/2012	07/2012	01/2013	06/2013
\$0	\$0	\$0	\$1250
02/2012	08/2012	02/2013	07/2013
\$0	\$0	\$0	\$1250
03/2012	09/2012	03/2013	08/2013
\$0	\$0	\$1250	\$1250
04/2012	10/2012	04/2013	09/2013
\$0	\$0	\$1250	\$1250
05/2012	11/2012	05/2013	10/2013
\$0	\$0	\$1250	\$1250
06/2012	12/2012		
\$0	\$0		



# Documentation for the Late Start of SGA

- Documentation from the VR must include a signed IPE and notes relevant to the case for the late start of SGA.
- Services provided should align with the goal on the IPE that led to the employment and or assisted the beneficiary with becoming self-sufficient.



# Payment Periods

- Net Payment Period - ACP and direct costs are paid within the net payment period.
- Gross Payment Period - Post employment costs are paid within the gross payment period.



# Net Payment Period

- Net Payment Period starts with the date Social Security benefits began or date the client entered VR (**whichever date is the latest**).
- Net Payment Period ends with the 9<sup>th</sup> month of SGA, date the VR closed the case, or the date benefits cease (**whichever date is earliest**).



# Gross Payment Period

- Gross Payment Period starts with the date Social Security benefits began.
- Gross Payment Period ends with the 9<sup>th</sup> month of SGA, or the date the benefits cease (**whichever date is earliest**).



# Costs Outside of NPP

One or more of the requested cost are outside of the Net Payment Period (NPP)

Example:

Net Payment Period: 03/2022 – 12/2023

Cost Requested:

- (041) Post Secondary Education (12/2022 - 12/2023)
- (045) On the Job Training (12/2022-03/2024)

One or more of the costs requested is not within the net payment period. SSA will request a breakdown of itemized cost.

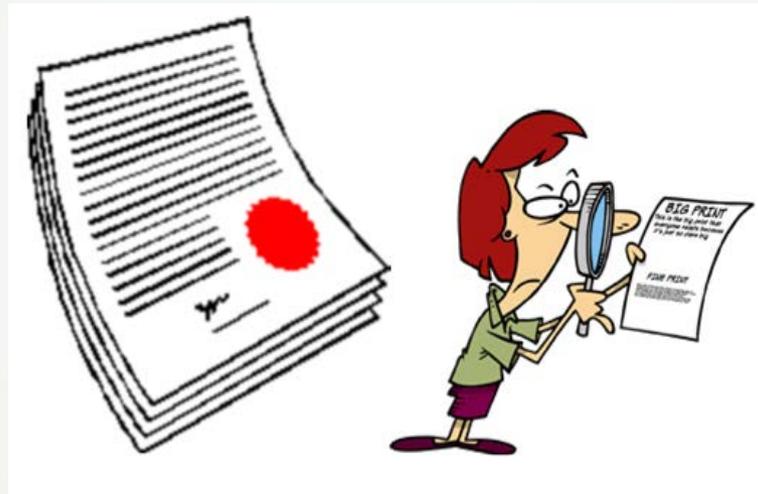


# Timeframe for Submitting Documentation

- 30 days - For late start of SGA
- 30 days - Itemization of direct cost on SSA-199
- 75 days - Pre-Payment Validation Review (PVR)



# PVRs for Vocational Rehabilitation Cost Reimbursement Claims



Securing today  
and tomorrow

# Purpose of Pre-Payment Validation Review (PVR)

- Ensure that VR services and costs meet the requirements for the requested payment.
  - For more information refer to the VR Provider's Handbook.
- SSA will validate all costs requested; costs that are not validated are not eligible for payment.



# Documentation Required for PVR

- Signed Individualized Plan for Employment (IPE) or amended IPE
- Case Notes
- Signed SSA-199 and the itemized costs in order
- Proof of payment for requested services



# Proof of Payment:

## Examples of Acceptable Documentation

- Copies of all direct costs, including date of service, type of service rendered, cost of service, proof of payment
- Copies of bills, checks, credit card, and EFT transactions
- Receipts under the vendor's letterhead with paid date stamp and signature
- Authorizations and invoices with Warrant or Procurement numbers



# Post Validation Review

- All payment requests with overlapping claim periods will need a post validation review.
- SSA will request the signed IPE and all cost documentation from both the VR that was previously paid and the VR that is requesting a payment.
- SSA may review any paid claims. If we find that a VR was overpaid, we will recoup the payment.



# Cost Formula

- The cost formula is used to identify the monthly dollar amount, per client, for which SSA will reimburse a VR for every month of the beneficiary's VR payment period.
- This formula determines the Administrative, Counseling, and Placement (ACP) costs that SSA pays VRs.
- The ACP costs are calculated each fiscal year.



# Payment Reports and Notices

- VR agencies are able to create reports using data downloaded from the Ticket Portal. The two report types are: “VR Payments Already Made to Me” and “VR Pending Payments for Me.”
- Notice of Determination - once a claim is processed, a notice of determination will be mailed to the VR.
  - Denial: Notice mailed same day claim is processed.
  - Paid: Notice mailed once wire is transferred to bank by SSA.



# Ticket Portal Overview



Securing today  
and tomorrow

# Topics

- Accessing the Ticket Portal
- Ticket Portal Resources
- Using the Assignment Lists
  - Actions Link
  - Show Assignments
- Review of the VR Cost Reimbursement Payment menu
  - Request a payment by SSN
  - Upload a VR claim File
  - View All Pending VR Payments for Me
    - Faxing Additional Information
  - Payments Already Made to Me
- Q&A



# Accessing the Ticket Portal

- All Ticket Portal users must have an active suitability clearance and a *mySSA* account with advanced (previously “extra”) security

## Create an Account or Sign In

**i** You only need one Login.gov or ID.me account.

If you already have a Login.gov or ID.me account, do not create a new one. You can use your existing account to access Social Security services.

[Create an account with Login.gov](#)

Sign in with  LOGIN.GOV

Sign in with ID.me

Sign in with Social Security Username

For accounts created *before* September 18, 2021



# Accessing the Ticket Portal

- If you created your Ticket Portal login prior to 2021 and you have not transitioned your *mySSA* credentials to login.gov, now is the time to make the change.

**i** To enhance security and identity protection, we are transitioning from Social Security username accounts to Login.gov.

To continue accessing Social Security services, you must create a Login.gov account.

If you have an existing Login.gov or ID.me account, please sign in below.

**?** Learn more about Login.gov and ID.me

FAQs: Your account transition questions answered

Create or Sign in with Login.gov

Sign in with ID.me

Exit

Continue with FIS Simulator

Continue with FIS Load Simulator

Continue without Transitioning



# Accessing the Ticket Portal

- While employees of Employment Networks (ENs) have two additional checks for added security, SSA *automatically updates* this information for employees of state VR agencies. If you see a message in the Portal indicating that your security awareness or employment verification is about to expire, you do not need to take any action. SSA is tracking this data and will ensure that you have continued Portal access.

## **IMPORTANT**

- If you do not log in the Portal at least once every 90 days, your account will be locked, and you need to contact SSA to have your access restored.
- SSA will remove your Portal account after 180 days of inactivity.



# Ticket Portal Resources

- The Ticket Portal User Guide is a resource to have at your fingertips when using the Ticket Portal.
- It contains detailed instructions on how to use the VR payment features:
  - Requesting a payment by SSN
    - What do all of the fields mean?
  - Uploading an electronic claim file
    - Instructions for creating both file types
    - How to read the results file
- Please consult the guide before contacting us with a question:  
**[VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov)**.



# Assignment Lists

## Assignment lists

- [List beneficiaries currently assigned to me\\*](#)
- [List beneficiaries formerly assigned to me\\*](#)

\*For most activities select a beneficiary from a list for further action



# Displaying Assignment Lists

- Depending on the number of clients, you may not see any results on the screen.
- You will need to use the search options to view your client list:
  - Assignment dates
  - Payment method
    - Milestone/Outcome
    - Outcome Only
    - VR Cost Reimbursement
  - Name search



# Performing Actions from the Assignment Lists

- To protect PII, SSNs are not displayed on the screen and clients are listed in order by name.
- You can use the Actions link on the right-hand side of the screen to take actions on a specific client.
- To see the SSN, you will need permission from SSA to download files. You will see the option to “Download Entire List to Excel” if you have been granted download rights.



# Download Entire List to Excel (currently assigned)

This is the best way to manage your Ticketholders.

Actions you should take monthly:

- Confirm all cases are currently open with your agency
- Confirm that all cases have the correct payment method

List Of SSA Beneficiaries Currently Assigned To Vocational Rehabilitation Agency								
<b>Assignment From</b>	None							
<b>Assignment To D:</b>	None							
<b>Assignment Meth</b>	Milestone, Outcome, SVR							
<b>Include only Pen:</b>	No							
<b>Name Search</b>	None							
Name	Ticket	Assigned	Payment Method	Most Recent Payment	Payment Type	Paid To	Payment Restriction	Last TPR
Mouse, Mickey	99999999TW01	09/12/2011	VR Cost Reimbursement			None Yet		Unknown
	99999999TW01	10/06/2009	VR Cost Reimbursement			None Yet		Unknown
	99999999TW01	10/06/2009	VR Cost Reimbursement			None Yet		Unknown
	99999999TW01	01/09/2015	VR Cost Reimbursement			None Yet	No	No TPR completed
	99999999TW01	04/15/2011	VR Cost Reimbursement			None Yet	No	No TPR completed
	99999999TW01	03/16/2006	VR Cost Reimbursement			None Yet	No	No TPR completed



# Download Entire List to Excel (formerly assigned)

This is the best way to manage your Ticketholder history.

Action you should take monthly:

- Confirm the closed cases match your records, including terminated Tickets

List Of SSA Beneficiaries Formerly Assigned To									
Assignment From Date	None								
Assignment To Date	None								
Un-assignment From Date	02/21/2024								
Un-assignment To Date	02/20/2025								
Assignment Method	Milestone, Outcome, SVR								
Include Terminated Tickets	Yes								
Name Search	None								
Name	Ticket	Assigned	Unassigned	Payment Method	Most Recent Payment	Payment Type	Paid To	Payment Restriction	Ticket Termination Date
DUCK, DAISY	123456789TW01	01/11/2025	01/12/2025	VR Cost Reimbursement			None Yet		
	123456789TW01	01/13/2025	01/14/2025	VR Cost Reimbursement			None Yet		
	123456789TW01	12/11/2017	02/22/2024	VR Cost Reimbursement			None Yet	No	
	123456789TW01	09/12/2022	05/31/2024	VR Cost Reimbursement			None Yet	No	06/01/2024



# Actions link

You can take the following actions:

- Show assignments
- Show TPR status
- View and manage case notes
- Request a VR payment
- Unassign or close this case
- Portal Activity



# Show Assignments

Two most common questions based on information displayed on this screen are:

- How is the Earnings Last 24 Months value determined?
- How accurate is the Ticket In-Use and Current Pay History?



# VR Cost Reimbursement Claims Menu

This menu includes the following options:

- View Administrative and Tracking Cost Factors
- SSA VR Payment Ceiling Calculator
- Request a VR Payment by SSN
- Upload VR Claim File
- View all VR Pending Payments for Me
- View VR Payments Already Made to Me
- View VR Claim Payment Adjustments



# Request a VR Payment by SSN

- This screen mimics the SSA-199 form.
- If you do not have all of the information needed to complete the SSA-199, please do not start filling out this form online.
- There is no way to save your incomplete payment request in the Portal. You cannot start entering data and then save and come back at a later time.
- You can fax in additional information after you have submitted your request.



# Upload SVR Claim File

- This screen allows you to send multiple claims to SSA by uploading an XML file.
- The Ticket Portal User Guide contains all of the information you need to create a file.
- The response file will tell you the SSA reference number for each claim.
- Each entry will create a new claim in the VR Pending Payments for Me.
- You can fax in additional information after you have submitted your request.



# View All Pending VR Payments for Me

- All VR claims that have not been approved for payment or denied will appear on the pending payments list.
- To narrow your search to cases in diary, click on the “Only display Diary VR work cases” box.
- To view the diary comments, click on the Actions link, then click “Show Diaries”
- Take note of the diary expiration date and any request for information.



# Faxing Additional Information

- It is imperative that you use the “Fax additional information” link associated with the pending case.
- The option will generate a fax coversheet for one-time use that is directly tied to your case.
- Once you have generated a fax coversheet, a “Show Fax Status” option appears.
- You can create unlimited fax coversheets as long as the case is pending, but once the fax is received by SSA it will no longer reach our system.
- You can verify that SSA has your fax by checking the fax receipt date.



# View All VR Payments Made to Me

- All completed VR claims will be listed on this screen.
- You can filter by payment dates to create custom reports and download the results to Excel.
- Be sure to check the box to include denials if you want to see your denials.
- You can click on the Action Code hyperlink to see the denial reason for any denial.



# Resources

## ■ Phone

- Monday through Friday 9 a.m. – 5 p.m. ET
- Toll Free: 1-866-949-3687/TTY: 1-866-833-2967
  - Option 1: Beneficiary Help Desk
  - Option 2: EN Payments Help Desk
  - Option 3: EN Systems Help Desk
  - Option 4: State Vocational Rehabilitation Agencies

## ■ Email

- For issues regarding: Cost Reimbursement, Ticket assignment, the service provider website, and the Ticket Portal email [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov)

