**Slide 1**

Hello. Welcome to the training on Procuring Services, Supplies, and Equipment.

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Upon completion of this topic, learners will be able to:

-Identify the purpose for providing required services, supplies and training

-Identify common and specific supplies and equipment

-Identify special supplies and equipment

-Determine when and how to authorize services, supplies and training

-Enter authorizations correctly in IPPS

-Process certifications in IPPS

-Determine best practices for invoicing in IPPS

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The purpose for providing required supplies and equipment is to enable a claimant to pursue rehabilitation and achieve the goals of his or her program.

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-Required books (either a hard copy or electronic version)

-Office supplies (e.g., paper, ink/toner, pens, pencils, markers, binders, envelopes, anti-glare screens, ergonomic products)

-Required tools

-Consumable goods (e.g., Internet installation and service if not currently available at claimant’s home or training facility, toner, ink cartridges, flash drive)

-Computer packages (e.g., computer, power source, memory, monitor, speakers, software, printer, scanner, surge protector, extended warranty, service plan)

The term supplies is defined as books, tools, and other supplies and equipment which VA determines are necessary for the claimant's rehabilitation program.

The case manager is responsible for ensuring that any purchase of supplies is required or necessary for the claimant to pursue his or her rehabilitation goal. Refer to M28C.V.B.1.07 on authorization for supplies and other services.

The claimant must contact his or her case manager to request approval prior to purchasing any supplies that are optional, recommended, or reference books.

The claimant is responsible for payment of any unauthorized item. The claimant’s failure to pay the bookstore may result in his or her inability to purchase any required books and supplies from the bookstore for subsequent terms.

**Note**: A computer and/or webcam must not be provided to any claimant for the sole purpose of participating in Tele-counseling. Refer to M28C.IV.A.1 for more information on Tele-counseling.

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VA must provide a claimant with all the supplies, including consumable goods, needed for a program of rehabilitation services. The case manager is solely responsible for determining the need for the goods.  In accordance with 38 CFR 21.210 through 21.222, VA will authorize only those goods which are required:

-To be used by similarly circumstanced individuals who do not have a disability in the same training or employment situation

-To mitigate or compensate for the effects of the claimant’s disability while he or she is being evaluated, trained, or assisted in gaining employment

-To allow the claimant to function more independently and to lessen his or her dependence on others

A case manager who questions the appropriateness of a request for a specific item must check with the facility to determine whether the program requires the item.  VA cannot pay for an item solely because the claimant wants it.  Unless the claimant qualifies under one of the exceptions outlined above, the case manager must not approve payment for the item if other participants in the same program do not need the item, and the case manager has not otherwise approved the item.

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When the goods are not required, but still necessary for the claimant to successfully pursue his or her program under provisions of 38 CFR 21.156 pertaining to incidental goods and services, the case manager may authorize the item if both of the following conditions apply:

The item is generally owned and used by all students pursuing the required course.

Students who do not have the item would be placed at a distinct disadvantage in pursuing the course.

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The case manager must take into consideration whether the claimant already owns the goods before authorizing the purchase of the goods, including a computer package or Internet service. However, there may be situations when a claimant already owns a good, such as a computer, but it is still necessary to purchase the supply because it is used by others in the household. It may not be necessary to purchase Internet service in this situation if the claimant already has Internet service provided for the use of his or her entire household.

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The case manager must ensure that a justification is provided for making the purchase either on VAF 28-1905m, Request and Authorization for Supplies, or in an electronic case note. A purchase card may be used when supplies or equipment are not available in the training facility or bookstore and for required purchases of specific items that are not outlined in the claimant’s rehabilitation plan. Once the goods are received by the claimant, the claimant must notify the case manager upon receipt of the purchased items and verify that the items are in good condition using one of the following methods:

-Claimant’s signed VAF 28-1905r, Receipt of Supplies (Chapter 31 - Veteran Readiness and Employment)

-Claimant’s email verification of receipt of specified supplies

-Signed and dated packing slip, receipt, or invoice from the claimant

-Claimant’s confirmation from e-VA, which includes a list of all received items (referenced from M28C.V.B.4.05c)

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When authorizing Supplies and Equipment, the claimant must be in 1 of the following case statuses: RTE, EE, IL, JR. (Note not E&P or INT)

The authorization date for Supplies should be after the signature of the rehab plan and the claimant is accepted to start training at a facility or the beginning date of other rehabilitation services unless there are compelling reasons to authorize them earlier.

Prior authorization is generally required by the case manager for supplies and equipment. There are some exceptions such as if it’s a standard required book, tool, or materials; the facility requires the item for all individuals in the claimant’s course or employment and the facility provides the item, prior authorization is not required. Items such as computer packages, cameras, and voice recorders must be approved in advance unless the facility requires all individuals pursuing the training course or program to own them personally. Requests for supplies must be received in writing from the claimant (an e-mail meets this requirement). VA must not reimburse a claimant for supplies purchased without prior VA approval unless the case manager determines that the claimant was acting in good faith to obtain the supplies. The VRC may authorize supplies before training starts in certain circumstances such as when the facility doesn’t provide the required supplies and the VRC must purchase the items using the government purchase card; the facility provides the required supplies, but VA is required to submit orders for supplies to the facility before the training start date; the required supply is needed prior to the training start date to increase the claimant’s ability to succeed in his or her program, such as purchasing a computer to give the claimant time to adjust to the new system. The reasons for early release of supplies must be documented in electronic case notes. When authorizing supplies prior to training, the VRC must document in an electronic case note.

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Whenever possible, VA will use the e-authorization form available in the Integrated Payment Processing System (IPPS) to authorize the purchase of supplies from the claimant’s training facility. This method ensures that supplies are available and can be secured in a timely manner. The VRC must only authorize supplies for approved periods. The e-authorization form outlines the approved supplies and is the basis for what services and supplies a vendor may invoice the VA. Refer to M28C.V.B.1.07 on authorization for Supplies, Services, and Training.

When a facility operates a bookstore for all students, payment to the bookstore for supplies issued to Chapter 31 claimants must not be greater than charges made to non-claimant students. Refer to the IPPS User Guide for information related to the preparation of the e-authorization form and processing payments for services. Refer to M28C.V.B.2 for additional information on IPPS.

The government purchase card may be used as a procurement and payment method for supplies purchased for claimants participating in the VR&E Program in accordance with the information and regulations established in Federal Acquisition Regulation (FAR), Veterans Affairs Acquisition Regulations (VAAR), and VBA Letter 20-18-08, Veterans Benefits Administration Procedures for the Government Purchase Program. The government purchase card should be used by VR&E as a payment method for supplies not available at a local facility bookstore. Refer to M28C.V.B.4 for more information on using the Government Purchase Card.

Please note that the Centralized Administrative Accounting Transaction System (CAATS) is an accounting application used by VBA to transmit accounting information to FMS through a daily interface per M24-4 Chapter 01, Part 05, Section 5.02.

Use of this system by VBA is mandatory when purchasing goods and services using the government purchase card. It is a web-based system that maintains records of the charge card information and statement, acquisition checklists, purchase order requests, approvals, and the monthly purchase card log. Reconciliation of all purchase card transactions are conducted within this system. Any questions regarding access to CAATS or questions regarding the process should be directed to the Administrative and Loan Accounting Center (ALAC) at VBAALAC\_CAATSTEAM@va.gov.

Direct reimbursement is appropriate when a facility bookstore does not carry required supplies, or a vendor does not accept the government purchase card. Reimbursement to a claimant for the purchase of supplies should be the last available option and should not be utilized unless there is no other way to obtain the supplies in a timely manner. Refer to M28C.V.B.6 for more information on direct reimbursement.

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VA may replace items that are necessary to the further pursuit of the claimant's program when they are lost, stolen, misplaced, or damaged beyond repair through no fault of the claimant. A request for replacement of an item previously purchased must be received in writing from the claimant (an email from the claimant meets this requirement) and must explain how the item was lost, stolen, misplaced, or damaged. A police report must be attached to a request for the replacement of a lost or stolen item and evidence that the claimant investigated replacement through an extended warranty, service plan, or homeowner’s insurance must also be presented by the claimant along with the request, as appropriate. If a replacement item is granted the claimant will be provided a replacement item at a comparable value of the previous item.

If the VRC grants the claimant’s request for replacement of supplies or equipment, the claimant must be provided VR-64, Positive Chapter 31 Decision Letter. This letter must include VAF 20-0998, Your Rights to Seek Further Review of our Decision.

If the VRC denies the claimant’s request for replacement of supplies or equipment, the claimant must be provided VR-58, Chapter 31 Adverse Decision Letter. The letter must include VAF 20-0998.

VA may make a loan from the revolving fund to a claimant to purchase an item that VA will not agree to replace, if the claimant is without funds to pay for the item. Refer to M28C.V.B.8 for more guidance on Revolving Fund Loans (RFL).

If a claimant refuses to replace an item needed to pursue the program after VA determines that its loss or damage was his or her fault, the claimant's refusal may be considered as noncooperation under 38 CFR 21.364. Refer to M28C.III.C.3 for more guidance on actions following findings of unsatisfactory conduct and/or cooperation. If the claimant's program is discontinued under provisions of 38 CFR 21.364(b), he or she will be able to be reenter the program only when the necessary items have been replaced, or it is determined the item is no longer required to complete the vocational goal or a different vocational goal.

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VA will generally provide non-consumable supplies only one time, even though the same supplies may be required for use by the claimant in another subject or in another quarter, semester, or school year. Examples of non-consumable supplies that VA will generally only provide one time include the following:

-Books

-Computer packages

-Voice recorders

-Cameras

-Tools

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VA may provide the following supplies or equipment to claimants training in the home:

-Books, tools, and supplies required by all facilities that train individuals for the claimant’s objective, whether the training is at home or outside of the home.

-Supplies and equipment that are essential because the claimant is pursuing training at home. Equipment in this category may consist of items that are not required by facilities that train outside of the home.

-Special equipment, such as a vise or drafting table.

-Supplies needed to enable the claimant to function more independently in his or her home and community.

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The books and related training supplies that VA may provide a claimant in farm cooperative training depend upon the type of instruction he or she is receiving. The following conditions apply:

-When group instruction is part of a claimant's course, VA must provide books and supplies that the facility requires all students taking the course to own personally.

-When all instruction is given on the claimant's farm by an individual instructor, VA must provide to the claimant only those textbooks and other supplies that would ordinarily be required by a facility.

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A claimant receiving employment services may be provided with goods in the following situations:

-The employer requires similarly circumstanced individuals to own the item upon beginning employment. This means that the items were not provided during the period that the claimant was training for the objective or that the items that were provided for training purposes are not adequate for employment.

-VA determines that special equipment is necessary for the claimant to perform his or her duties, subject to the obligation of the employer to make reasonable accommodations to the disabling effects of the claimant's condition.

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If the claimant needs goods to secure employment following training or while in a program consisting only of employment services, the case manager must take the following steps:

-Obtain VAF 28-1905m, Request and Authorization for Supplies (Chapter 31 - Veteran Readiness and Employment), from the employer; the employer must identify the type of program and sign under Signature and Title of Official in Section III to verify that the requested items are necessary for the successful achievement of a vocational goal.

-Arrange for delivery of the required goods during the period of employment services. Once the goods have been received by the claimant, he or she must verify receipt of the goods using one of the methods specified in M28C.V.B.4, which includes VAF 28-1905r, as an option.

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The case manager must determine what supplies and equipment the claimant needs for self-employment while developing the self-employment plan and secure all necessary approvals before authorizing supplies. The provision of service is based on category assignment. The case manager and the claimant must prepare VAF 28‑1905m to document the supplies that VA will provide. Refer to M28C.IV.C.5 for guidelines related to self-employment.

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The need for any supplies or equipment being considered to address an independent living (IL) need must be substantiated by the results of both the preliminary and comprehensive IL assessments. The claimant’s rehabilitation plan must specify how the authorized equipment will be used to overcome an identified barrier to independence in daily living, including criteria to measure the success of providing this service and explain how this success will be sustained after VR&E services are terminated. Refer to M28C.IV.C.6 for additional information on supplies and equipment for IL plans and services.

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VR&E may purchase necessary goods for claimants participating in On-the-Job Training (OJT), Apprenticeship, or Non-paid Work Experience (NPWE). The case manager must discuss with the employer any goods that are required of all journeymen employees on the job. This does not include goods that are normally owned by the employer. Uniforms that are normally rented must be rented as opposed to purchased. A VAF 28-1905m must be completed and signed by the employer, the claimant, and the case manager for all required goods. Once the claimant receives the goods, he or she must verify receipt of the goods using one of the methods specified in M28C.V.B.4, which includes VAF 28-1905r, as an option.

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A claimant who is eligible for the Special Employer Incentive (SEI) Program may be required to have specific training materials and supplies. The employer may receive reimbursement for direct expenses. The employer must be vendorized and obtain a facility code. The employer must submit an invoice which is authorized by the counselor in the Invoice Payment Processing system (IPPS). The employer must only be provided direct reimbursement for training materials and supplies that they provided which are required by all employees on the job.

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Flight training may be authorized for a claimant as part of his or her degree curriculum in the field of aviation or related field. Payment for medical examinations that are required to obtain a medical certificate may be authorized for the claimant to pursue pilot training. In addition, payment for the flight insurance may be authorized for the claimant if the institution requires all students to purchase flight insurance. However, deductibles under the purchased insurance policy cannot be authorized since those are not an established charge or customary fee paid by all flight students.

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Special supplies and equipment may be authorized as necessary to enable a claimant to mitigate or overcome the effects of a disability in pursuing a rehabilitation program. If the claimant needs special equipment and is eligible for the equipment under other VA programs, such as medical care and treatment at VA medical centers, then the items must be provided under that program.

When the case manager establishes evidence that special equipment may be needed for a claimant to begin, continue in, or complete a rehabilitation program, a referral to the Veteran’s Health Administration (VHA) should be completed. The case manager should use VAF 28-8861, Request for Medical Services – Chapter 31, or electronic referral to describe the reason(s) he or she believes special equipment is needed as part of the claimant’s rehabilitation plan, and to request that VHA conduct an evaluation and provide any necessary services. Refer to M28C.V.A.4 for further guidance on completing VAF 28-8861 or electronic referral.

Before the item may be purchased by VR&E, the VHA physician must determine that the claimant both:

Needs the special equipment, and

Is ineligible for the needed special equipment under other programs and benefits administered by VA.

The major types of special equipment that may be authorized by VR&E include the following:

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This category includes items that are ordinarily used by all individuals pursuing training but are modified to make more accessible to an individual who has a disability (e.g., a calculator with speech capability for a claimant who is blind or visually impaired, a computer keyboard adapted for one-hand typing, or voice activation and speech recognition software).

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This category includes items that are specifically designed to mitigate or overcome the effects of disability. They range from eyeglasses and hearing aids to closed-circuit TV systems that amplify reading material for claimants with severe visual impairments.

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This category includes adaptations of the environment not generally associated with education and training, such as adaptive equipment for automobiles or supplies necessary to modify a claimant's home to make either training, self-employment, or independence in daily living possible.

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VR&E may provide mobility devices, such as wheelchairs or mobility scooters, as part of a rehabilitation plan of services when arrangements cannot be made to provide these services through VHA. A wheelchair or mobility scooter is defined as a mobility device designed to accommodate a disability and must be prescribed by a physician. Consultation between VR&E staff and VHA prosthetics staff may be necessary to determine what type of mobility device a claimant needs and to decide whether it can be provided by VHA. VR&E’s authority to provide mobility services does not extend to the purchase or rental of automobiles, trucks, boats, or similar conveyances, such as golf carts or All-Terrain Vehicles (ATV). A tractor or mower must never be approved as a mobility aid.

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The purchase or rental of vehicles for claimants participating in the VR&E Program is prohibited under any circumstance. A vehicle is defined as a conveyance moving on wheels, runners, tracks, or the like, that is used for transporting people or goods. VA must not authorize assistance for the purchase or rental of cars, trucks, boats, or other vehicles, such as golf carts or ATVs.

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Authorization for reimbursement for purchase of firearms is addressed during evaluation and planning with the claimant. For authorizing reimbursement for purchase of firearm for a claimant, the term “firearm” also refers to ammunition and firearm parts. The requirements for approving the authorization for reimbursement for purchase of firearms prior to plan development are outlined in M28C.IV.C.2.

The VRC must assess the suitability of the occupational goal and provide the rationale for considering a vocational goal in which a firearm will be used during training or employment. For authorizing reimbursement of a firearm for a claimant, the term “firearm” will include ammunition and firearm parts.

The VRC must ensure that written documentation is obtained from the proposed training facility or employer that clearly addresses the following:

-The requirement for a firearm

-The specific firearm that would satisfy the requirement

-The date that the firearm is needed

-Any pre-conditions that must be met before training or employment can begin

The VRC must take the following steps to obtain concurrence when developing a rehabilitation plan that includes reimbursement for a firearm:

-Development of Proposed Rehabilitation Plan

-The VRC and the claimant must develop a proposed rehabilitation plan with the understanding that the plan has not been approved and services are not authorized unless concurrence is obtained from the VR&E Officer and the Regional Office (RO) Director. Under the heading “Services Provided” in the rehabilitation plan, the VRC must clearly document the type of firearm that the VA will reimburse, as well as any specific quantities of ammunition, firearm parts, and/or other related equipment that are needed to reach the employment goal.

-The following statement must also be included in the proposed plan:

"Appendix BA, Conditions of Reimbursement for Purchase of Firearms, must be signed by the claimant and the VRC. Reimbursement for the purchase of a firearm may not be authorized without the concurrence of the VR&E Officer and the VA RO Director.”

If concurrence is not obtained, the VRC must inform the claimant using Vocational Rehabilitation (VR) letter VR-58, Chapter 31 Adverse Decision Letter and VAF 20-0998, Your Rights to Seek Further Review of Our Decision, and work with the claimant to explore alternative vocational goals that do not require a firearm. If concurrence is obtained, the VRC must inform the claimant using VR-64, Chapter 31 Positive Decision Letter, and VAF 20-0998, Your Rights to Seek Further Review of Our Decision and proceed in the plan development process.

Review of State and Local Laws

The VRC must review relevant state and local laws and regulations regarding the purchase, licensing, registration, and use of firearms to identify any issues that should be addressed prior to authorization of such reimbursement. VA Regional Counsel should be consulted to assist with this review. A copy of local laws and regulations, and/or Regional Counsel’s review of the application of these laws in this specific case, should be filed in the claimant’s VR&E record.

Documentation of Application and Registration Process

The claimant is responsible for completing any necessary applications or other paperwork regarding background checks (criminal, mental health, safety, or other), licensing, and registration of the firearm, and permit(s) to carry and/or use the firearm. VA may reimburse the claimant for the cost of these applications, as outlined in M28C.V.A.3. A copy of all paperwork related to the application for the firearm must be filed in the claimant’s VR&E record. If the claimant is approved or cleared for the reimbursement, copies of the clearance documentation, license, and/or registration of the firearm, and related permits must be filed in the claimant’s VR&E record.

Required Concurrence

The VRC must prepare a memorandum to the RO Director through the VR&E Officer for review and concurrence prior to authorizing the reimbursement of a firearm. The VR&E Officer is responsible for reviewing the claimant’s entire VR&E record, the current VA service-connected and non-service-connected disability ratings, and any pending claims for disability. The VR&E Officer must use Appendix AZ , Review Prior to Approval of Reimbursement for Purchase of Firearms, to identify and address any issues that could warrant disapproval of the reimbursement. Examples of disability conditions which warrant sufficient documentation to resolve any doubt of the appropriateness of the handling of firearms include the following:

-neuropsychiatric conditions, such as schizophrenia

-major depression

-bipolar disorder

-other mental health conditions, such as post-traumatic stress disorder

-anxiety disorder

-substance abuse

-Veteran Readiness and Employment Officer’s Concurrence

-If the VR&E Officer does not concur, the VRC must provide the claimant with written notification of the decision via VR-58 and VAF 20-0998.

- If the VR&E Officer concurs, the memorandum and claimant’s VR&E record will be forwarded to the RO Director for review and concurrence.

Regional Office Director’s Concurrence

If the RO Director does not concur, the VRC must provide the claimant with written notification of the decision via VR-58 and VAF 20-0998.

If the RO Director concurs, a copy of the memorandum and the concurrence must be filed in the claimant’s VR&E record. The VRC must provide the claimant written notification of the decision via VR-64 and meet with the claimant to review and sign Appendix BA, Conditions of Reimbursement for Purchase of Firearms.

Refer to M28C.V.A.3 for guidance on procedures for processing reimbursement of the purchase of a firearm.

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Payment for the purchase of service dogs, guide dogs, or companion animals for claimants participating in the VR&E Program is prohibited under any circumstance. This also means that VR&E must not authorize payment for training, or any other services related to the claimant’s companion animals or service dogs. Refer to M28C.V.A.4 for further information related to the use of companion animals and service dogs.

Payment for the purchase of service dogs, guide dogs, or companion animals for claimants participating in the VR&E Program is prohibited under any circumstance. This also means that VR&E must not authorize payment for training, or any other services related to the claimant’s companion animals or service dogs. Refer to M28C.V.A.4 for further information related to the use of companion animals and service dogs.

Companion Animals: animals that may support individuals with emotional or mental health disorders and the companionship/relationship is described as therapeutic. There are accredited non-profit agencies that VRC can refer Veterans as well; however, VR&E may not authorize any payment for training or any other services related to companion animals.

Service Animals: Service animals are guides, commonly dogs, prescribed for a disabled Veteran under 38 CFR 17.148 related to the Veteran being diagnosed as having a visual, hearing, or substantial mobility impairment.

Service animals are guides, commonly dogs, prescribed for a disabled Veteran under 38 CFR 17.148 related to the Veteran being diagnosed as having a visual, hearing, or substantial mobility impairment.

The VA has implemented rules for guide, hearing, and mobility dogs into one regulation, 38 CFR 17.148, Service Dogs. VA does not provide service dogs but does provide veterinary health care and other benefits in support of guide dogs and hearing and mobility service dogs to maximize the life and utility of these specialized dogs. The Veteran must apply for the VA Veterinary Health Benefits through VHA. The clinical requirements for a service dog and potential VA benefits are outlined in 38 CFR 17.148.

When a VRC determines that a service dog may be needed for a claimant to begin, continue in, or complete a rehabilitation program, a referral to VHA will need to be completed to evaluate the clinical need for a service dog or guide dog. For more information, visit the VA’s website on Service and Guide Dogs.

VHA has a well-designed program to assess the claimant's need and ability to benefit from a service dog. The VRC should use VAF 28-8861 or an electronic request for medical services in CAPRI to describe the reason or reasons the VRC believes a service dog may be needed as part of the rehabilitation plan under VR&E and request that VHA conduct an evaluation and provide services deemed necessary.

A VHA prescribing clinician will review each request and evaluate the claimant’s medical need and circumstances for the following:

-The claimant's ability and means, including through a family member or caregiver, to care for the dog currently and in the future.

-The claimant's goals that can be accomplished through the use of the dog.

-The claimant's goals that can be accomplished through other assistive technology or therapy.

VHA will inform the claimant of its approval or disapproval of the request for a service dog. Once approved for a service dog, VHA will refer the claimant to accredited service dog organizations, such as Assistance Dogs International (ADI) or International Guide Dog Federation (IGDF). The referral is done to maintain the integrity of the Service Dog program and ensure claimants are receiving the highest level of quality and training standards for their service animal. There is no charge for the dog or the associated training. However, the claimant will be expected to work with the service animal at some point during the service animal training.

VHA Rehabilitation and Prosthetic Services administers this benefit program for eligible approved Veterans through a contracted insurance policy, which includes:

-Comprehensive Veterinary Care, including annual visits for preventative and maintenance care, immunizations, dental cleanings, urgent or emergent care, prescription medications, and chronic illness or disorders that treatment allows the service dog to perform its service duties.

-Equipment required for optimal use of the dog.

-Travel Support for training the Veteran as a handler.

The VA does not assume the service animal as the property of the VA. Therefore, the VA will not assume responsibility for or take possession of any service animal. The VA will not pay for items such as license tags, non-prescription food, grooming, insurance for personal injury, non-sedated dental cleanings, nail trimming, boarding, pet-sitting, dog-walking services, over-the-counter medications, or other goods and services not covered by the policy. The claimant is responsible for procuring and paying for any items or expenses not authorized by the service animal agreement. If, after a comprehensive assessment, VHA determines that a service dog is not needed or that the claimant cannot adequately care for a service dog, VR&E must not purchase a service dog, or anything related to the use, care, or training of a service dog using Chapter 31 funds.

For more information on VHA’s policies on service dogs, refer to VHA website.

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Protective articles or uniforms will be provided at VA expense, when the facility requires all individuals to wear this type of clothing to pursue training or employment. In accordance with 38 CFR 21.219(a), VA must not provide any other types of clothing, including caps and gowns for graduation.

If the VRC grants the claimant’s request for supplies or equipment, the claimant must be provided VR-67, Positive Chapter 31 Decision Letter at Plan Development or VR-64, Chapter 31 Positive Decision Letter if the request is approved outside of plan development. This letter must include VAF 20-0998, Your Rights to Seek Further Review of our Decision.

If the VRC denies the claimant’s request for supplies or equipment, the claimant must be provided VR-58, Chapter 31 Adverse Decision Letter. The letter must include VAF 20-0998.

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In accordance with 38 CFR 21.219(b), appropriate past issues of magazines, periodicals, or reprints may be provided in the same manner as books when required for a course or training.

If the VRC grants the claimant’s request for supplies or equipment, the claimant must be provided VR-67, Positive Chapter 31 Decision Letter at Plan Development or VR-64, Chapter 31 Positive Decision Letter if the request is approved outside of plan development. This letter must include VAF 20-0998.

If the VRC denies the claimant’s request for supplies or equipment, the claimant must be provided VR-58, Chapter 31 Adverse Decision Letter. The letter must include VAF 20-0998.

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Musical instruments, cameras, or other items that could be used personally by the claimant must only be provided if required by the facility to meet requirements for degree.

If the VRC grants the claimant’s request for supplies or equipment, the claimant must be provided VR-67, Positive Chapter 31 Decision Letter at Plan Development or VR-64, Chapter 31 Positive Decision Letter if the request is approved outside of plan development. This letter must include VAF 20-0998, Your Rights to Seek Further Review of our Decision.

If the VRC denies the claimant’s request for supplies or equipment, the claimant must be provided VR-58, Chapter 31 Adverse Decision Letter. The letter must include VAF 20-0998.

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The amount of supplies that VA may authorize for special projects, including theses, must not exceed the amount generally needed by similarly circumstanced individuals in meeting course or thesis requirements. The claimant’s committee chairman, major professor, department head, or appropriate dean must certify that the special project or thesis is a course requirement and that the expenses are reasonable and required to complete the project or thesis. Furthermore, requests for supplies for special projects and theses may have additional requirements the claimant must provide prior to the VRC making a determination regarding the request in a timely fashion. Requests for special projects and theses will not be granted on the sole basis there is not enough time to change the project or thesis. In accordance with VA Acquisition Regulation (VAAR) 831.7001-3 (e), these expenses may include research expenses, typing, printing, microfilming, or copying.

If the VRC grants the claimant’s request for supplies, the claimant must be provided VR-67, Positive Chapter 31 Decision Letter at Plan Development or VR-64, Chapter 31 Positive Decision Letter if the request is approved outside of plan development. This letter must include VAF 20-0998, Your Rights to Seek Further Review of our Decision.

If the VRC denies the claimant’s request for supplies, the claimant must be provided VR-58, Chapter 31 Adverse Decision Letter. The letter must include VAF 20-0998.

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While the claimant is in a rehabilitation program, VR&E must arrange for maintenance of computer or special equipment. VR&E may pay for upgrades to the computer or special equipment for the claimant’s program or to make the claimant competitive in the employment market.

Extended Warranty/Service Plan

Often the best way to get system maintenance is to buy a reliable, comprehensive extended warranty/service plan on the equipment for the projected duration of the claimant’s program.

Upgrading to a New Computer System

Upgrading may involve buying a new computer system if the claimant’s current system cannot be adequately upgraded to meet either of the following:

The current needs of the rehabilitation program course work.

The projected use of the computer in the claimant’s planned employment.

Upgrading to a new system includes the transfer of the software and files from the old system onto the new system.

End of VR&E Responsibility

VR&E responsibility for maintenance and upgrade of supplies and equipment purchase by VR&E ends when the case manager places the claimant’s case in Rehabilitated or Discontinued case status.

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A case manager may authorize assistance for a Veteran’s child care if the case manager determines that child care is necessary for the implementation or continuation of the claimant’s rehabilitation program as outlined in 38 CFR 21.156. However, this service does not pertain to provision of services as outlined in 38 CFR 21.210 through 21.224.

Limited Assistance

A case manager may not routinely authorize recurring child care expenses. This limited assistance may only be authorized after all other options have been explored and determined as not viable solutions.

Limitations

Generally, child care assistance must not be authorized for more than one semester for the claimant pursuing college training or the equivalent amount of time for the claimant pursuing vocational or technical school training. In rare instances, when payment of child care expenses is approved, a licensed facility must be used to provide child care. Under no circumstances must payment be authorized for child care services that are being provided by a claimant’s family member.

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The following are some resources that a case manager must explore and utilize for child care assistance:

-Child Care Access Means Parents In School Program. This is a Department of Education sponsored program, which supports the participation of low-income parents in the postsecondary education system through the provision of campus-based child care services. Institutions of higher education that are awarded grants under this program may subsidize the costs of child care services for low-income students.

-Child care assistance available to eligible families through state agencies that administer federal grants. Each state determines eligibility requirements for families within their state. The case manager may refer the claimant to a list of state agencies on the National Child Care Information Center. The claimant may contact the coordinating agency in his or her state directly for eligibility information and how to apply for assistance. In some states, families can apply by telephone or mail.

**Slide 37**

Claimants have the option choose to rent hard copy textbooks rather than VR&E purchasing them. Book rentals for hardcopy textbooks may be authorized and paid for in the Invoice Payment Processing System (IPPS) or via direct reimbursement. Refer to M28C.V.B.2 for more information on IPPS and M28C.V.B.6 for more information on direct reimbursements.

Claimant's Responsibilities

Claimants are responsible for any upfront “hold” procedures or fees and such fees are not payable or reimbursable.

Claimants are responsible for any lost, stolen, damaged or late textbook rental fees.

Claimants who are unable to adhere to these provisions must opt out of the rental option and work with their case manager to obtain textbooks.

**Slide 38**

Case managers must not use the Government Purchase Card to issue payment for textbook rentals or upfront “hold” fees to any school bookstores. Case managers must not approve payments for lost, stolen, damaged or late textbook rentals fees. Case managers must not authorize the payments for book rentals when the same textbook has already been purchased for the claimant. Electronic textbook rentals or online access fees may be authorized and paid in IPPS or reimbursed via direct reimbursement as outlined above.

**Slide 39**

A claimant’s use of medical marijuana or a legalized recreational substance in states where it is legal, may not bar access to federal funding for a program of VA vocational rehabilitation services. However, provision of goods and services, as well as rehabilitation goals, related to the medical marijuana or a legalized recreational substance industry is prohibited. Training and tools for cultivating, distributing, dispensing, or selling of medical marijuana or a legalized recreational substance, must not be authorized under a vocational rehabilitation plan.

**Slide 40**

A Chapter 31 claimant shall be furnished medical treatment, care, and services when they are determined to be necessary to develop, carry out, and complete the Claimant's rehabilitation plan. The provision of such services is a part of the Claimant's entitlement to benefits and services under Chapter 31 and is limited to the period or periods in which the claimant is a Chapter 31 participant.

Department of Veterans Affairs (VA) Medical Center (VAMC) Directors are responsible for ensuring that health care services are provided to claimants with disabilities in receipt of rehabilitation services under Title 38 United States Codes (U.S.C.), 3107. The number of requests for medical and dental services for VR&E claimants is only a small fraction of the total annual number of annual services provided by Veterans Health Administration (VHA). However, these claimants are typically in a rehabilitation program or ready to enter the workforce. The timely delivery of these services is, therefore, critical to preclude the interruption of rehabilitation. It is VHA policy to provide timely access to VHA health care services for claimants participating in a veteran readiness and employment program under title 38 U.S.C., Chapter 31. The health care services authorized by title 38 U.S.C., Chapter 31 are limited to those provided in title 38 U.S.C. Chapter 17. See VHA Directive 1601A.02. for additional information.

The services that may be furnished by VHA for Chapter 31 claimants include the treatment, care, and services described in 38 Code of Federal Regulations (CFR) Part 17. VHA Directive 1601A.02 outlines policy for provisions of timely access to any VA healthcare services for claimants in the Veteran Readiness & Employment (VR&E) program as outlined in 38 U.S.C.3104(a)(9). In addition, the following services may be authorized under 38 CFR 21.240 even if they are not included or described in Part 17:

Assistive devices include prosthetic appliances, eyeglasses, dentures, and other corrective or assistive devices.

Special services cover a wide range of adaptive and compensating techniques to include the following:

-Language training, speech and voice correction, training in ambulation, and one-hand keyboarding

-Services related to blindness and deafness

-Orientation, adjustment, mobility, and related services

-Telecommunications, sensory, and other technical aids and devices

-Specialized Evaluations

Specialized evaluations include the following:

-Functional Capacity Evaluations

-Traumatic Brain Injury (TBI) Comprehensive Evaluation

-Evaluation to determine Learning Disability

-Occupational Therapy Evaluation

-Physical Therapy Evaluation

-Neuropsychological Evaluation

-General Medical Care and Services Provided

VHA provides the following basic care services to Veterans:

-Outpatient and inpatient medical, surgical, and mental healthcare, including care for substance abuse.

-Prescription drugs, including over-the-counter medications and medical and surgical supplies available under the VA National Formulary.

-Emergency care in VA facilities; and emergency care in non-VA facilities in accordance with sharing contracts or if authorized by 38 CFR 17.52(a)(3), 17.53, and 17.120-132.

-Bereavement counseling as authorized in 38 CFR 17.98.

-Comprehensive rehabilitative services other than services provided under 38 U.S.C. Chapter 31.

-Consultation, professional counseling, marriage and family counseling, training, and mental health services for the members of the immediate family, legal guardian of the claimant, or the individual in whose household the claimant certifies an intention to live, as necessary and appropriate, in connection with the claimant’s treatment as authorized under 38 CFR 17.50.

-Durable medical equipment and prosthetic and orthotic devices, including eyeglasses and hearing aids, as authorized under 38 CFR 17.149.

-Home health services authorized under 38 U.S.C. 1717 and 38 U.S.C. 1720C.

-Reconstructive (plastic) surgery required as a result of disease or trauma, but not including cosmetic surgery that is not medically necessary.

-Hospice care, palliative care, institutional respite care, noninstitutional extended care services, including but not limited to noninstitutional geriatric evaluation, noninstitutional adult day health care, and noninstitutional respite care.

-Payment of beneficiary travel as authorized under 38 CFR 70.

-Pregnancy and delivery services, to the extent authorized by law.

-Assistance with completion of forms (e.g., Family Medical Leave forms, life insurance applications, Department of Education forms for loan repayment exemptions based on disability and non-VA disability program forms) by healthcare professionals based on an examination or knowledge of the claimants condition, but not including the completion of forms for examinations if a third party customarily will pay health care practitioners for the examination but will not pay VA.

VHA provides the following preventative care services to Veterans:

-Periodic medical exams

-Health education, including nutrition education

-Support in the maintenance of drug-use profiles, drug monitoring, and drug use education

-Mental health and substance abuse prevention services

-Immunizations against infectious disease

-Support in the prevention of musculoskeletal deformity or other gradually developing disabilities of a metabolic or degenerative nature

-Access to genetic counseling concerning the inheritance of genetically determined diseases

-Routine vision testing and eye-care services

-Periodic reexamination of members of high-risk groups for selected diseases and for the functional decline of sensory organs, and the services to treat these diseases and functional declines

-Claimant’s Family Members

VA may furnish care, treatment, and services to a claimant's family members as necessary for the effective rehabilitation of the claimant. The term “family” includes the claimant's immediate family, legal guardian, or any individual in whose home the claimant certifies an intention to live. Generally, the services that may be furnished to the family are limited to a consultation on home care training, counseling, and mental health services of brief duration, which are designed to enable the family member to cope with the claimant's needs. Extended medical, psychiatric, or other services may not be furnished to family members under these provisions, per 38 CFR 21.155.

A claimant is eligible for the services mentioned above during periods in which the claimant is considered a participant in the VR&E program. These periods include the following:

-During the initial evaluation period

-During an extended evaluation period

-During a rehabilitation to the point of employability period

-While participating in an independent living (IL) services program

-While receiving employment services

Any other periods to the extent that services are needed to begin or continue in any of the statutes described above. Such periods include but are not limited to services required to facilitate reentry into rehabilitation following interruption or discontinuance because of illness or injury, per 38 U.S.C.3104.

Payment Responsibilities

VR&E does not pay VHA for any necessary medical services that are provided to VR&E claimants by a VAMC or other VHA facility, per 38 CFR 21.240 and 21.242. Claimants participating in a VR&E program are not exempt from medication co-payments, first party co-payments, or third party billing for care relating to non-service connected conditions, per VHA Directive 1601A.02.

Claimants seeking payment or reimbursement for medical services not authorized by the VA must follow and meet the guidelines outlined in 38 CFR 17.120-17.132 and file the necessary claim for refund with VHA.

Dental Services

Outpatient Emergency Dental Care

VHA is responsible for funding all outpatient dental services and treatment and related dental appliances for claimants, provided the treatment is medically necessary, and the claimant is otherwise receiving VA medical care and services. Dental treatment is limited to what is needed to address acute pain or a dental condition, which is determined to be endangering life or health. Examples include treatment for a significant infection, uncontrolled bleeding, or any other dental condition that is determined to be a severe threat to health or endangering life. The goal of this kind of treatment is to eliminate symptoms and remove foci of infection. Dental care under this category is generally limited to a one-time course of palliative treatment or procedures and appropriate pharmacological therapy. Routine dental care such as cleanings and checkups are not covered under this scope of care.

Class V Focused Dental Care

When a claimant is determined to be eligible for dental care, the dental facility provides the claimant with an evaluation by a dentist who must determine the appropriate scope of care consistent with the patient’s designated dental classification. VR&E claimants are eligible for Class V Focused Dental Care, per VHA Directive 1130, Dental Program for Department of Veterans Affairs (VA) Medical Facilities, and VHA Handbook 1130, Veterans Health Administration Dental Program. VR&E participants may receive outpatient dental treatment to resolve a specific dental condition dependent upon, and consistent with, the claimant's eligibility status. Treatment may include relief of pain, elimination of infection, or improvement of speech or esthetics.

A claimant who is actively receiving VR&E services may receive dental treatment to the extent needed to meet any of the following goals:

-To make possible the claimant’s entrance into a VR&E program.

-To achieve the goals of the claimant's VR&E program.

-To prevent interruption of a VR&E program.

-To expedite the return of a claimant to a VR&E program who is in interrupted or leave status.

-To expedite the return of a claimant to a VR&E program placed in discontinued status because of illness, injury, or dental condition.

-To secure and adjust to employment during the Job Ready and Employment Assistance period of the VR&E program.

-To enable the claimant to achieve maximum independence in daily living.

Requests for Class V dental care must be sent to the Dental Service by the Vocational Rehabilitation Counselor (VRC) using the electronic referral system outlined in Section 4.03 of this chapter or on VAF 28-8861, Request for Medical Services. A dental request must be provided for each episode of care requested. Dental care must not be provided beyond the anticipated rehabilitation date as specified on the form or electronic request for medical services. A claimant who refuses to participate in a requested confirmation examination or refuses to accept a treatment plan determined by VA to be satisfactory must have the claimant's dental treatment referral closed. Such failure to participate is considered the same as a refusal of treatment.

The Chief of Dental Service, or designee, has the primary responsibility for administering outpatient Non-VA Dental Care (formerly fee-basis care). The Chief of Dental Service reviews all proposed treatment plans for approval or disapproval and adjustment of submitted fees consistent with the Schedule of Maximum Allowances for Non-VA Dental Care. The decision to provide dental benefits to a claimant through a Non-VA dental provider is to be made by the Chief of Dental Service, or designee, after full consideration of all relevant factors. Such a decision, however, is not to be based on the preference or request of the claimant to receive their dental benefits from a private-sector provider but medical need.

The electronic request for medical and dental services is the primary referral source for VHA services for VR&E claimants and replaces the use of VAF 28-8861, Request for Medical Services. However, if a VR&E Office is unable to use the electronic submission, the use of VAF 28-8861 is required.

VRCs may submit referrals for VHA medical and dental services electronically through the Compensation and Pension Record Interchange (CAPRI). Each VHA facility has designated a single point of contact to receive and process referrals for claimants participating in the VR&E program.

The submission of electronic requests for medical and dental services is not a requirement. Preferably, it is an option to expedite the delivery of services to VR&E claimants and enhances the ability to track the status of the referrals using reporting tools in CAPRI.

Refer to M28C.II.A.2 for information on accessing CAPRI.

The case manager must follow these steps to complete an electronic request for medical services:

-Accessing the Medical Services Request Screen

-Sign into CAPRI.

-Select the appropriate RO, if prompted.

-Select the appropriate VHA facility. Enter the Patient Identification (ID), which is the claimant's Social Security Number without dashes.

-Click OK to go to the CAPRI main page.

-Click the “Voc Rehab” tab at the far right of the top menu tabs to access the “Medical Services Request” screen.

-Click “Add New Request” to access the request form.

-Completing the Medical Services Request in CAPRI

There are four required fields on the Medical Services Request Screen:

-Date of Rehabilitation – this field must match the date of anticipated rehabilitation on the claimant's rehabilitation plan.

-Medical Services Requested – use the drop-down box to choose the appropriate service. If the appropriate service is not listed, choose “Other.”

-Reason for Referral – this field is limited to 200 characters. Use the comments and notes section if more space is required to add specific questions, comments, or notes regarding the reason for the referral.

-Rehabilitation Objective – this field must match the information on the rehabilitation plan.

Entering Contact Information for Email Alerts

The Medical Services Request has a point of contact option. The case manager will be the point of contact for the claimant. CAPRI registers contact information at sign-in, to include an email address. CAPRI will alert the individual who inputs the electronic request for medical services via email when the request has been processed. This email will default to the email listed in CAPRI. The case manager must complete the following steps to ensure the correct email address is listed:

-Go to Tools.

-Click “Change Forwarding Address.”

-Click “Other.”

-Type in VA email address.

-Click “OK.”

Documentation Requirements

The case manager is required to document in an electronic case note when an electronic request is completed in CAPRI. The case manager must also follow all the procedural requirements for the citing of CAPRI records, as outlined in M28C.II.A.2.

Non-Electronic Requests for Medical or Dental Services

Although the electronic request for medical services is the preferred submission method, VR&E staff may continue to use VAF 28‑8861 to certify claimant participants and to identify the services or consultations requested. This form will be addressed to the department providing the requested service in the VAMC, as appropriate.

In the Comments section of VAF-28-8861, only information explicitly needed in the consult is requested, but VRCs should not specify how the treatment provider will assess the claimants for the required information. In some cases, treatment providers will be able to provide the requested information based on existing medical treatment records. It is especially important for Independent Living or feasibility evaluations to only request the services needed and not specific items that may have been identified in a preliminary evaluation. Claimants will only receive items that are deemed medically necessary by the claimant's primary care doctor or medical specialist that they have been referred to. The treatment provider will determine whether they will conduct an assessment or refer out to a specialist for specific evaluations.

VAF 21-4142, Authorization and Consent to Release Information to the Department of Veterans Affairs (VA), is used when requesting a medical opinion from a Non-VA provider and must be signed by the claimant.

Documenting the Need and Results for a Medical or Dental Consultation

The VRC must use one or more of the following methods to document the need for and results of a medical or dental consultation:

Email or mail VAF 28-8861, to the appropriate VHA eligibility department

Electronic request for medical services and medical notes in CAPRI

Electronic case notes

Controls to Expedite Referral Processing

The VR&E counselor will work alongside VHA facilities in order to create a local point of contact (POC) list. To assist in this process, refer to the VA Facility Locations by State web page. VRCs should reach out to the point of contact for each VAMC they partner with to coordinate to begin the referral process. Once a referral is placed, the POC receiving the referral will contact the claimant and make an appointment for the claimant to ensure medical, dental, mental health, prosthetic care, treatment, and services are provided in a timely manner.

Medical or Dental Consultant’s Recommendations

The VRC must review and carefully consider the recommendations of the medical or dental consultant. The VRC will review the information obtained through consultation in conjunction with all other information collected throughout the evaluation to make sound decisions regarding claimant medical needs in the rehabilitation and return to work process.

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Invoice and Payment Processing System

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1. This is the IPPS Splash “Welcome/Disclaimer” Page, please read the disclaimer and

2. Select the agree button

3. If VRC have questions, contact FSC, to access FAQs, click the “here’ link…VRC will then also access links the various IPPS User Guides.

4. Also to access your local Site Administrator you can click the drop-down button and select your station. Your station’s site administrator is listed and you can contact them to address access issues (account creation), and reassignment of authorizations and invoices.

The list of Site Administrators is available from the main IPPS website (https://vaww.ipps.fsc.va.gov)

**Slide 43**

This is the main IPPS user interface or page; the VRC will have a menu that will have various options depending on your role. However, most VRCs will have the My Work option that will have Authorization Form, My Authorization, and other options to select from. To create a new authorization, select the Authorization Form

Enter the Vendor’s name or Vendor ID to conduct a Vendor search (Select the Vendor/Facility/School)

In the Search for Participant Section, enter the SSN to search for the Participant Search, select the Claimant/Veteran. Without the dashes. If using the Vendor ID, do not use dashes either.

In the Review Authorization Facility/Vendor Section, list the type of service to include the degree type with applicable. Specific information such as specific courses that are approved to include courses at guest universities if the claimant is dual-enrolled.

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Next is the enrollment period enter the start date and end date…Note this time period cannot be more that 365 days.

Now in the Line-Item Details Section, identify the services that case manager is approving. The Budget Object Code or BOC code is listed after the service. This just lets VR&E and SSD know which budget pool to pull the money from.

The service provider’s email is the School Certifying Official which may be one person (the SCO) or may be a corporate mailbox where the SCO and others at the facility are able to receive the authorization. Name of the SCO, name of the facility and Facility Code can be located in CWINRS.

To complete the authorization, click the submit button. Once a case manager clicks the submit button, they will get a popup verifying the service provider’s email to confirm.

If the vendor ID has multiple universities under it, case managers must know the full zip code of the school they are searching for, thus if they add the zip code they may have better results.

**Slide 45**

Here are some best practices when working with authorizations in IPPS. Check the service provide email any time an authorization is created. Use the facility code of the school when issuing authorizations to bookstores for books and supplies. To narrow down the search for a particular vendor, use the zip code field entering the zip code where a vendor is located.

**Slide 46**

Each invoice works its way upward through the system. When a user submits an invoice for approval, the system looks at two things:

-Has the threshold for the invoice line item been met or exceeded?

-Which role is next in the line for approval?

Low Dollar invoices do not require as many approval levels as high-dollar invoices. The slide indicates the dollar thresholds for the two types of invoices to give you an idea of the approvals required:

Let’s give a couple examples:

Example 1: If an invoice comes in for books that exceeds $15,000, the Supervisor can recommend approval, then the RO Director can recommend approval, but the Director has the final approval.

Example 2: If an invoice comes in for books for $6,000, the Supervisor provides the final approval and does not go to the next level.

Please note the high-cost memo is different from the IPPS Dollar Thresholds. The High-Cost Memo is completed during plan development and relates to the total cost of tuition, books, fees and supplies per calendar year when cost exceed $35,000. Please continue to follow guidance in M28R.IV.C.1.04.b.3.

**Slide 47**

Invoice Certification

**Slide 48**

On this slide we show Invoice Certification List. VRC can find this under the My Work which is in the middle of their mail screen in IPPS. VRC will notice that these invoices are pending certification. VRC will select a line item, by double clicking on that item. And on the next slide, the actual invoice is displayed.

**Slide 49**

Once VRC are in the actual invoice certification page, VRC will want to View Invoice image. The invoice should pop-up with an itemized list of charges. If VRC do not see this pop-up in a separate screen or window VRC may want to check the settings on your pop-up blocker.

**Slide 50**

Here we have a sample invoice from Barnes & Noble bookstore. Let’s take a look at some key areas on this invoice and what every invoice should include.

All invoices should include the following:

-Name of vendor

-Invoice date

-Invoice number, account number and/or any other identifying number (here they have PO Number, which should look familiar as it’s the same as our Authorization Number)

-Vendor point of contact name, title and telephone number (whenever possible)

-Claimant’s name and file number with clearly delineated costs per claimant, if applicable

-Description, price and quantity of goods and services rendered with the charges grouped under categories (e.g., tuition, books, fees and supplies)

-Date(s) goods were delivered, or services were provided

-Supporting detailed information, if applicable (e.g., receipts listing itemized costs for books, fees and supplies

**Slide 51**

All invoices should include the following:

-Description, price and quantity of goods and services rendered with the charges grouped under categories (e.g., tuition, books, fees and supplies)

-Date(s) goods were delivered, or services were provided

**Slide 52**

Please note Barnes and Noble has been working with all their bookstores to secure a signed receipt when the claimants travels to the bookstore to secure their books in person. When web-based orders are unable to secure signed receipt. The case manager is responsible for ensuring the claimant received the invoiced items through the following ways:

-VAF 28-1905r, Receipt of Supplies form as an acceptable way to confirm receipt of supplies

-The claimant’s signature on the invoice acknowledging receipt of the invoiced services.

-An email or other written confirmation of receipt of invoiced services from the claimant.

-A confirmation from e-VA.

Note: A verbal confirmation of receipt is no longer acceptable. The case manager must get the claimants signature for books and supplies purchases. This is an OFM requirement.

**Slide 53**

A few best practices:

-Double-check those invoices to ensure the claimant has not charged unauthorized items, such as candy, clothing, or external hard drives.

-Remember not to authorize any invoices sent before the add/drop period for the term (also do not hold onto those invoices until after the add/drop period), you need to reject the invoice.

It seems there are some facilities who have decided it’s a bit too much to provide itemized invoices. Well, according to OFM this is a No, No and we must reject the invoice. Unfortunately, we do not have any wiggle room for this. Should the school decide not to work with VR&E, then we will have to stop working with and facility/vendor.

**Slide 54**

Additional things to consider:

- Even though you see the message that an invoice is outside the authorization period, OPEN the invoice and check the date of the purchase as it doesn't always match the date the facility entered it into Tungsten

- M28C policy change- rental books may now be purchased and approved through IPPS, M28C.V.A.3.03.l

- Case Managers can upload documents into IPPS, ex. Confirmation that books have been received M28C V.B.2.04.b

**Slide 55**

Refusing an invoice completely should be a last resort.

Do not refuse for these reasons:

-Missing receipts signed by the Claimant from bookstores.

-It is the Case Manager’s responsibility to get confirmation of receipt of books and supplies from the Claimant if the bookstore does not provide a signed receipt

-Line items do not equal the total or one line item is not an approved purchase.

Case Managers can edit, add (for taxes), and delete line items to help balance the amount to the Payment Amount.

Online items are not an approved purchase

Refuse an invoice:

-Wrong Claimant or unauthorized services/term

-No itemized list of purchases either attached or typed out in IPPS

Case Managers should reject invoices sent for tuition before the drop/add period for the term

**Slide 56**

Rejecting Invoices. Review the invoice within seven calendar days of receipt of invoice in IPPS. VA has seven calendar days to return an improper invoice to a vendor, and 21 calendar days from receipt of the proper invoice to pay the invoice. Advise the vendor of any rejected charges and return documentation of rejected charges to service provider. Advise the claimant of rejected charges and provide VR-58, Chapter 31 Adverse Decision Letter to include VAF 20-0998, Your Rights to Seek Further Review of our Decision. VR&E staff should follow the procedures on adverse actions as outlined in M28C.III.C.2.

A case manager must reject any invoice received prior to the drop/add period for the program the claimant is attending.

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Technical issues with Tungsten or IPPS, contact the FSC Enterprise Support Team:

This includes referring Schools and Vendors

Email: VAFSCEnterpriseSupport@va.gov

Phone: 1-866-372-1141

VR&E Policy guidance: VRE\_IPPS.VBACO@va.gov

Training:

VA 4552537 VRE IPPS Refresher Training and Updates

VA 4528353 VRE e-Authorization & e-Invoicing National Training

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IPPS Short Demo Videos: Invoice-Payment-Processing-System-Logging In

<https://vba-media1.vbatraining.org/video/vre/logging_in_audio/index.html>

Invoice-Payment-Processing-System-Authorizations-Demo

<https://vba-media1.vbatraining.org/video/vre/invoice-payment-processing-system/authorizations-demo/>

Invoice-Payment-Processing-System-Certification-Demo

<https://vba-media1.vbatraining.org/video/vre/invoice-payment-processing-system/certification-demo/>

Invoice-Payment-Processing-System-User-Admin-Demo

<https://vba-media1.vbatraining.org/video/vre/invoice-payment-processing-system/user-admin-demo/>

Invoice-Payment-Processing-System-High-Dollar-Threshold-Demo

<https://vba-media1.vbatraining.org/video/vre/invoice-payment-processing-system/high-dollar-threshold-demo/>

Invoice-Payment-Processing-System-Export-Excel-Demo

<https://vba-media1.vbatraining.org/video/vre/invoice-payment-processing-system/export-excel-demo/>

**Slide 59**

Now that the learner has completed this topic, they will be able to:

-Identify the Purpose for providing Required Supplies and Equipment

-Identify Common and Specific Supplies and Equipment

-Identify Special Supplies and Equipment

-Determine When and How to purchase Supplies and Equipment

-Enter Authorizations correctly in IPPS

-Process Certifications in IPPS

-Determine Best Practices for Invoicing in IPPS

**Slide 60**

This concludes the training, thank you