

## Welcome

### Jennelle Bratcher (Cognosante, TPM)

Jennelle Bratcher welcomed everyone and thanked them for their time and participation.

## SSA Updates

### Katie Striebinger (SSA)

SSA is in the process of transitioning the VR payment workload to the Ticket Program Manager. The first workload we transitioned was payment processing. SSA has started transitioning the next workload, which is the VR Help Desk. There will be an introduction of staff who are answering questions received on the help desk. Please be assured that SSA is still present and will continue to provide oversight and policy guidance. SSA is fading into the background so that Cognosante can shine in the spotlight.

There was confusion on the last blast that was released on the IPE, the Individualized Plan for Employment. There has been no change to the IPE signature policy and what is accepted by SSA. There is no change to that policy and how IPE forms must be signed. That's the mistake that came out in the last GovDelivery message. The IPE signature policy is that it must be signed. That form must have a signature and a date.

The blast that went out refers to an original blast sent on November 12, 2020. SSA sent a reminder to all the VRs about IPE signature policies. As a reminder, any time we talk about a blast, protocol, or are discussing an email, and you did not receive notification, please reach out to the help desk so that we can ensure you are on the list and can all get the messages.

The message that went out on November 12, 2020, stated, "All Individualized Plans for Employment (IPE) submitted to Social Security as documentation for claims involving a late start of substantial gainful activity (SGA) or pre-payment validation reviews (PVRs) must be signed. Social Security must ensure that the agreement between the beneficiary and the representative of the state Vocational Rehabilitation (VR) agency is valid before allowing payment for cost reimbursement. If you have a pending claim that includes an IPE without signatures, you should use the Portal to request an additional fax cover sheet and upload an IPE with signatures to attach to your claim. If you have any questions, please email the VR Help Desk at [VR.Helpdesk@ssa.gov](mailto:VR.Helpdesk@ssa.gov)." SSA reiterated that they are not changing the policy. A signature is still required. The signature can include a wet signature or an electronic signature.

SSA is still working on the cost formula and as soon they have an update, with a new FY 2023 formula, or a viable formula that might work, they will share it. Katie stated the importance of VRs getting all emails.

## Cognosante VR Provider Support and Staff

### Jennelle Bratcher (Cognosante, TPM)

Jennelle introduced Cognosante's VR Provider Support Team, the individuals who will assist VRs with any requests regarding cost reimbursement.

**Jennelle Bratcher** is TPM's Director of the VR Ticket Operations and she has worked with the Social Security Administration, and TPM, for over 19 years. She has a passion for the work that TPM and SSA does.

**Kimberly Bailey** is TPM's VR Payments Manager and she worked for the Social Security Administration for 18 years. She worked as a Clerk Typist, a Teleservice Representative, and an SSI Claims Representative. She has also worked on various government contracts for the last 15 years.

**Sharday Jenkins** is TPM's Provider Help Desk Manager and has over 12 years of experience with TPM serving as a Ticket to Work Call Center Rep, Document Support Specialist, Senior Payment Specialist, and Provider Help Desk Analyst. Sharday is the manager of the team that provides front-line services, forward/process escalations, and assists in resolving complex issues.

**Emani Cain** is one of TPM's Senior Claims Technicians who began working with Cognosante a little over a year ago. She assists Kimberly Bailey, VR Payments Manager, with oversight of the staff as well as daily reporting.

**Alayna Howard** is one of TPM's Claims Technicians processing cost reimbursement request. Alayna also assists the Provider Help Desk with cost reimbursement inquiries.

**Kirsten Roberts** is one of TPM's VR Help Desk Analysts and is one of the first TPM staff members reached on the front line at the VR Help Desk. She has worked with Cognosante for the past year as a Claims Technician for the VR team and recently transitioned to the Provider Help Desk.

**Rhonda Madden** is one of TPM's VR Help Desk Analysts. Rhonda has worked with Cognosante for over a year and her background is in medical billing and collecting. She's also one of the individuals that assists on the Provider Help Desk.

**Melanie Tarleton** was the final VR Help Desk Analyst to be introduced. Melanie has a background in medical career development and is happy to assist on the Provider Help Desk.

This group of individuals, Alayna, Kirsten, Rhonda, and Melanie will be running the VR Provider Help Desk; however, SSA will remain in the background to oversee progression. SSA is also

there if VRs have questions, concerns, and if they want to escalate. Raquel Donaldson will remain involved in Help Desk inquiries and will be there to assist, if needed.

### Help Desk Updates

#### Sharday Jenkins (Cognosante, TPM)

When submitting your requests to the Help Desk, please include your PID number. This is formally known as the DUNS number. It will ensure your requests are being processed without delay. When sending an email, please provide the PID in the subject line, or in the body of your email.

## Questions & Answers (SSA)

**Question:-** Will a copy of the presentation be mailed to us after the meeting?

**Answer:** Yes, you will receive a copy of the PowerPoint. It may take a couple of weeks. Expect to receive a copy of the PowerPoint in the coming weeks.

**Question:** For electronic signatures, client's type in their name instead of signing it. If it's stamped and the typed name is there, is that OK?

**Answer:** If you want SSA to review your electronic signature in the system, we can do that. The policy states that a signature, an electronic signature, or a wet signature is acceptable. If you have been sending IPEs to SSA since 2020 and they have been electronically signed, and we have not sent you a message saying that it is not signed, then your electronic signature is valid, and accepted. If you are about to change something about your signature that you have been submitting since 2020 and you want to contact SSA to see if we will accept your change, please reach out to the VR Help Desk. So, whatever you have been submitting since 2020, as long as it has been accepted to this date, we will still accept it today. We are not making any changes. I hope that clarification helps. Thank you.

**Question:** Will SSA be issuing an official notification of the acceptance of electronic signatures?

**Answer:** No, we do not need to send another notification. We have not made any change. That is where the confusion came in. The blast that went out was a signature policy that was targeted for specific forms. but there's no change to the acceptance. We are not changing. But we are accepting IPEs. If you previously submitted something, you still have our approval. We do not intend to send another message that you need to make a change to what you have been doing. Anything you have been doing so far is approved by SSA.

**Question:** Although our DUNS number is now called a PID, the number remains the same?

**Question:** I want to reiterate; we did send a blast out about that. We made the change back on April 4, 2022. We made the change because we had to change the number in our system, so if you do not have the blast that went out, please reach out to the VR Help Desk to make sure that you are getting our messages. We did change the name, even though it is still the same number, it is now a provider I.D. and it's the same nine-digit number. We did not change numbers, so you are still using the same PID number. If you have any questions about that, please reach out.

**Question:** For late start of SGA, how many years are considered a late start?

**Answer:** Late start of SGA is one year after the VR close date. That's considered a late start, one or more years after the 9<sup>th</sup> month of SGA.

**Question:** - Has it been taken into consideration extending that time?

**Answer** - No.

**Question:** No? It has been a hardship for our staff to get those plans from them, asking them to request them, or get them out of the records center and then getting them back to us. So, I was just hoping there could be a little bit longer timeframe considering how long they're keeping them in the office.

**Answer:** -That's why you have a year. That's why we give you the 12 months after the ninth month of SGA. You still have another 12 months for the consideration for late start.

**Question:** - Can you speak about the EN annual services and supports review that now requires us to submit Partnership Plus agreements for every state Vocational Rehabilitation agency that your EN has an agreement with?

**Answer:** - I will have to go take that back with our EN team. We are aware of the outreach, but I do see a specific question in the chat, so I will pass that along. But it is an audit that they are doing as part of the annual review. And we can get back to you. Are you able to give me a little bit more information Jennifer?

**Question:** Okay, thanks. Sorry. It was an email that I received and the way that I took it was obviously some states had formal partnership plus agreements, and some states do not. It sounds like that Employment Networks are going to be required to submit their Partnership Plus agreements that they have with each state. So, I don't know if this necessarily means that for

those that do not have agreements, if this is almost going to require us to do so? And there was another question, after that as well. It's in the chat.

**Answer:** Would it be okay, if it is something we put in the recap, or would you want us to send out a blast for more specifics for the VR agency? If we were to talk to you directly, what kind of answer are you looking for?

**Question:** I guess what I'm trying to find out is, currently we do not have a formal agreement. Is this going to be something that we need to jump on and do more later, or do we need to jump on into something at all? What is our responsibility with the agencies we work with? What is our requirement to submit that, and what is the impact that that has on each state VR?

**Answer:** Okay, we will send a blast out with any action required by VR agencies so everyone can get the same information. I was not under the impression that there was any action required at this time. SSA was just doing information gathering as part of the review, but we will follow-up.

**Question:** Some of our ENs also expressed that they are being asked to provide agreements for vendor services for their VR; not just partner EN agreements. There was a concern that this was an overreach by SSA TPM.

**Answer:** SSA will follow up on the entire issue. Thank you for all of your input. We have a good feel for your concern so we can make sure we get back a meaningful response to you.

**Question:** I was just wondering, if this kind of thing happens in the future because what it immediately did was, it had many of our partners contacting us to request copies or make sure we were current. If we knew that was coming, like if there was a request going out, could you give us a heads up? That would make us be able to respond to those requests. It helps to know what's coming.

**Answer:** Yes, I agree. The EN should have that as part of the audit.

**Conclusion –** The next VR quarterly call will be on April 11, 2023. TPM will send out GovDelivery notices with information about the call.