

Jennelle Bratcher: Hi, good afternoon, everyone. Welcome to today's quarterly VR Call. My name is Jennelle. I'm always excited when it's time to meet. Before we begin with our agenda and presentation, I would like to review a few housekeeping items. Please note, this meeting is being recorded and transcribed.

Here are a few housekeeping matters. Please remain muted during the call, unless called upon by the facilitator. Please feel free to ask a question in the chat section. If joining via phone, and you wish to ask a question, please raise your hand utilizing star, 5. You will be unmuted by the facilitator, then press star 6 to unmute. Please ask one question at the time you are called upon by the facilitator. Additional questions and comments can be sent to VRHelpdesk@SSA.gov. They will be appropriated and forwarded to the correct commentor. The meeting is closed captions by utilizing the close captioning link provided. Go to the close caption link by clicking on more, then scroll down to the list to turn on live captions. When using the link option, paste the link in the browser, and it will open in a separate window to view closed captions. Thank you in advance for your participation. Next slide.

For today's agenda, Katie Striebinger, from the Social Security Administration will provide our introduction, signature policies, and she will also speak on FY 2023. We will be providing introductions for Provider Support, and we are super excited about that. We will also discuss VR help desk requests. There will be a Q&A session before we close at the meeting. Now, I will turn the meeting over to Katie, who is the Vocational Rehabilitation Branch Chief with Social Security Administration. Katie.

Katie Striebinger: Hi. Good afternoon, or good morning. That depends on where you are calling from, but we are so thankful that you are joining us today for the quarterly All VR Call. I'm not sure if you realize it, but we rely on your partnership. We thank you for taking time out for the quarterly call. As I mentioned on the last quarterly call, SSA is in the process of transitioning. The workload before we transitioned, was payment processing. We have started transitioning the next workload. On today's call, we will introduce you to staff who are answering your questions. I want to assure you that SSA is still present, and we will continue to provide oversight and policy guidance. We are not going anywhere; we are just maintaining in the background so we can let Cognosante shine in the spotlight. I want to move on to our first topic, which is IPE, the Individualized Plan for Employment. There was a question about a blast that came out that caused confusion.

I want to start by reiterating that there has been no change to the IPE signature policy. This is all designed to be accepted by SSA. There is no change to that policy about how some things must be signed. So that's the mistake that came out in the last blast. The only policy on signature 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 that we sent on November 12, 2020. We sent a reminder to all the VRs about IPE signature policies. I'm going to read it to you. I want to send a

reminder— anytime we talk about a blast, or we're discussing an email, and you did not receive that publication, please reach out to the help desk so that we can make sure we can get you on the list and you can all get the messages.

I'm going to read the message, and this is November 12, 2020. "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."

Just to reiterate, we are not changing the policy. A signature is still required on that form. The signature can include a wet signature, or an electronic signature. If there are any questions, we will have Q&A at the end of the call. If you have questions, we will address that at the end. I want to make sure that I covered that we are still working on the costs. As soon as we have an update for you, with new cost formulas, or a viable formula that might work, we will send it out to everyone. Once again, that is why it is important that you get all our emails, so that when we do send something out, you get it. Those are the only updates I have, and there will be time at the end for Q&A, and in case you have any questions, please put them into the chat message, and I will hand it back to Jennelle. Thank you, Jennelle.

Jennelle Bratcher: Thank you so much, Katie, for all that very informative guidance. Now, I am quite excited to introduce Cognosante's VR Provider Support Team. You may hear from anyone of us to assist you with any requests for VR payment assistance. We really wanted to take the time for you to get a chance to see and hear from the people that you have most of your interactions with. We are here to help you with most of your VR payment needs. So I would like to start off with introducing myself. Those of you who are not familiar with me, my name is Jennelle Bratcher. I'm the director of the VR Ticket Operations Department. Also note that you may hear us refer to ourselves with pseudonyms. I have been with Social Security administration, and also now TPM, or a little more than 20 years. I have a passion for the work that we do here at TPM, and Social Security Administration. I think I know most of you, so I don't have much to say. But I am so thankful to have an opportunity to work with you guys. And in this capacity, I am always available for any of your needs. Please remember to reach out to the VR Help Desk first, and anything that needs to be escalated, you can send it my way.

So now I'd like to introduce you to Kimberly Bailey. Kimberly Bailey is the VR Payments Manager here at Cognosante. Kim, take it away.

Kimberly Bailey: Good afternoon, everyone. Again, my name is Kimberly Bailey, and I am the VR Payments Manager. It's a pleasure to be here today. I worked for Social Security as well, for



18 years. My work included clerk typist, tele-service rep at the Baltimore tele service center, and also a claims representative. I have worked on various government contracts, and I'm excited to be here, and I look forward to working with each and every one of you. Thank you.

Jennelle Bratcher: Thank you, so much Kim. I appreciated that introduction. Now I would like to introduce Sharday Jenkins. Sharday is the Help Desk Document Manager here at Cognosante. It's a pleasure to have her as part of my team.

Sharday Jenkins: Thank you, good afternoon, everyone. My name is Sharday Jenkins. I have been with Cognosante over a year now. I'm the Help Desk Manager. I previously served as a Ticket to Work call center rep. It's a pleasure to meet you all, and we look forward to providing you quality service of the VR Help Desk. Thank you. Coming back to you Jennelle.

Jennelle Bratcher: Thank you so much, Sharday. I do want everyone to pay close attention to Sharday. Sharday is the manager of the team that is going to be providing you front-line services, help with any escalations, any complex issues. Sharday will be able to assist you. Of course, follow our normal escalation channel and you can reach out to the VR Help Desk government we will escalate properly. But Sharday has many years of help desk experience with TPM, [and] we are quite happy to have her on. Right now, I would like to introduce Emani Cain. Emani is one of our senior technicians, and she is on the team that processes all of your payment requests. Emani.

Emani Cain: Hi, everyone. My name is Emani Cain. I am a Claims Technician on the VR team. I've been working with Cognosante for little over a year now and I oversee the team with Kim. It is a pleasure to meet you, and I am looking forward to helping you guys in the future.

Jennelle Bratcher: Thank you so much, Emani. Now I would like to introduce everyone to Alaina Howard. Alaina is one of our Claims Technicians. She also supports the VR Help Desk. Alaina?

Alaina Howard: Hello, everyone. My name is Alayna Howard. I am currently working as a claims technician, and I also am assisting as a Program Analyst for the VR Help Desk. So I will be happy and excited to help out in working with everyone. And I really enjoy being part of the program. Thank you.

Jennelle Bratcher: Thank you so much, Alaina. We really appreciate that. Next on the line, I would like to introduce Kirsten Roberts. She is a VR Help Desk Analyst. She's the first one that is going to be providing a lot of the front-line services to you when you contact the VR Help Desk. Kirsten?

Kirsten Roberts: Hello, everyone. I've been working with Cognosante for the past year. I started off as a Claims Technician for the VR, and I currently transitioned into the role of Program Analyst for the help desk. It's nice to meet everyone, and I look forward to working with you.

Jennelle Bratcher: Thank you so much, Kirsten. Kirsten, just to give you a little kudos on the call, you did an amazing job as a Claims Technician processing the payment requests. And it is our pleasure that it is the first week joining the VR Help Desk team. So welcome aboard to that team. Next, I would like to introduce Rhonda Madden. She is also a Help Desk Program Analyst, who is going to be providing you with service for any of your needs.

Rhonda Madden: Hello, my name is Rhonda Madden. My background is in medical billing and collecting. I am happy to be here to help as needed.

Jennelle Bratcher: Thank you so much, Miss Rhonda. Now I would like to introduce Melanie Tarleton. Melanie is last but not least of our VR help desk program analysts that we are introducing to you today. Melanie.

Melanie Tarleton: Good afternoon, everybody, I have a background in medical career development, and I'm working on the VR Help Desk team. I'm looking forward to working with you in the future.

Jennelle Bratcher: Thank you so much, Melanie. We greatly appreciate all the introductions. It's really a way that we are able to get everyone together that supports you, for you to get a chance to put a name with the faces. Next, we will move on. Next slide, please. So before I turn it over to Sharday to go over the VR help desk, we would like everyone to take an opportunity to hear from Raquel Donaldson. She's the fearless leader of the VR help desk. So it's a pleasure to turn it over to you, Raquel.

Raquel Donaldson: Thank you, Jennelle. Good afternoon, everyone, and happy new year. The four young ladies you just met, Alayna, Kiersten, Rhonda, and Melanie, they will be taking over the VR help desk. However, as Katie mentioned in the beginning, we are not going anywhere. So I am the one training them. I am the one that they seek out if they have questions, concerns, and if they want to escalate. I am still here. So, have no fear. But I do promise you that you are in great hands. They have done an awesome job in training, and still continue to do so. Again, if there's anything that you need, I am still around to assist. Thank you so much, and I look forward to still speaking with you all. Jennelle.

Jennelle Bratcher: Thank you so much, Raquel. We know that Raquel has a wealth of knowledge, so we are so thrilled that she is providing all of the training, and the guidance to all of our staff that's new and becoming acclimated to the VR Help Desk. So once again, thank you so much, Raquel. Now I would like to turn the call over to Sharday Jenkins. Sharday, once again, is the Help Desk Manager, and she will provide some help desk updates.

Sharday Jenkins: Thank you, Janelle. Going forward, we are requesting when you submit requests to the help desk, if you would please include your PID number, which is formally known as the DUNS number. We are getting acclimated, but I just want to assure that they are getting

process and directed efficiently. So when you send an email, if you could provide a PID in the subject line, or in the body of your email, it would be appreciated. Thank you. And back to you Jennelle.

Jennelle Bratcher: Thank you so much, Sharday. And thank everyone for all of the updates. So this now concludes our presentation. And we will transition to our Q&A session. As a reminder, to ask a question over the phone, please raise your hand on teams by dialing star 5. And if you follow along, remember, you will be unmuted by this facilitator. Just press star 6 to unmute. This is a two-step process. For those in the Teams chat, enter your question into the chat, or raise your hand. You now have the ability to turn on your cameras if you choose. This is strictly optional, but we would love to see your faces. Please remember to identify yourself by name. Katherine, do we have any callers?

Katherine Jett: We don't have anyone right now, Jennelle, thank you. Emani, do we have any questions in the chat?

Emani Cain: Yes, we do have a question from Christian Benatar. Please excuse me if I pronounced it wrong. The question is, will a copy of the presentation be mailed to us after the meeting?

Jennelle Bratcher: That is a great question. Yes, you will receive a copy of the PowerPoint. It may take a few minutes, but you'll receive it. So, just expect to receive a copy of the PowerPoint in the coming weeks.

Emani Cain: We also have another question from Kelly Lisa. For electronic signatures, clients type in their name instead of actually signing. Is this still OK, as long as it is in there?

Jennelle Bratcher: I will defer that to Social Security Administration.

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

Jennelle Bratcher: And if anyone needs additional clarification, please feel free to ask your question in the chat or raise your hand. Do we have any hands raised at this moment, Katherine?

Okay, we can continue to take sessions in the chat.

Emani Cain: Deanna asks will SSA be issuing an official notification of the acceptance of electronic signatures?

Katherine Striebinger: No, we do not need to send another notification. We have not made any change. So that is where the confusion came in. The last one that went out was a signature policy, but there's no change to the exception. We are not changing except for IPE. 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.

Jennelle Bratcher: Thank you so much. Emani, do we have any more questions in the chat?

Emani Cain: Yes, we have a couple of more. One from Sara. Quick question, though our DUNS number is now called a PID, the number remains the same?

Jennelle Bratcher: The number is the same. But Katie, you take it if you would like.

Katie Striebinger: I want to reiterate; we did send a blast out about that. We made the change back on April 4. 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, your number has not changed; it is now a provider I.D. number. But the number remains the same nine-digit number. We are not allowed to change numbers on anyone, so you are still using the same PID number. If you have any questions about that, please reach out.

Jennelle Bratcher: Great. Please remember that you can raise your hand on the Teams app if you have any questions. Katherine, do we have any raised hands at the moment?

Katherine Jett: No, Jennelle, we do not. We do now. And this is Anita Barclay Smith. She is unmuted. There you go. Good afternoon, Anita.

Jennelle Bratcher: Anita, you also have the option to turn your video on, your camera, if you click on the camera icon. Perfect. Good afternoon. And you will also have to click on the mike icon to unmute. It's in the top right, Anita.

Anita Barclay Smith: Good afternoon. Okay, this is my question. You mentioned about late starts for SGA, and I'd like to know how many years are you considering a late start? After the claim has closed — How many years?

Raquel Donaldson: Hi, Nita, happy new year. This is Raquel. So late start of SGA is one year after the VR close date. That is considered a late start. One or more years.

Anita Barclay Smith: Has it been taken into consideration extending that time because this has been hard for us. I'm trying to get those plans, asking VR to request them, getting the records and its hard getting them to get back to us. So I was hoping there could be a little bit longer of a timeframe, considering how long they're keeping them in office.

Raquel Donaldson: That's why you have a year. That's why we give you the 12 months after you qualify for the original date. You still have another 12 months for the consideration for late start.

Anita Barclay Smith: Okay. I'll work a little bit closer with them, that's all. Thank you.

Jennelle Bratcher: Thank you so much for your question, Anita. And thanks so much for showing your smiling face. We appreciate also being able to put faces with names. Do we have any more questions? Emani, do we have any questions in the chat?

Emani Cain: Yes, we do, from Jennifer Braddox. 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?

Katie Striebinger: Okay, I will have to go take that back with our EN team. We are aware of the outreach, but I do have a concern of the chat message, so I will pass that along. But it is, it's 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 Braddox: 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.

Katie Striebinger: Okay. Would it be okay if it is something we put in the recap, or it is an audience where you would want us to send out last for more specifics for your agency? If we were to talk to you directly, what kind of answer are you looking for?

Jennifer Braddox: I guess, and I'm new in this role, but I guess what I'm trying to find out is — you know, right now 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?

Katie Striebinger: Okay, we will send a blast out with any action required processes. I'm not getting the impression that they would be action required at this time. We were just doing information gathering as part of the review. But we will follow-up.

Janelle Bratcher: Thank you very much. You have any other questions in chat?

Emani Cain: Yes. Eric Schmidt was following up on Jennifer and her 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.

Katie Striebinger: 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. Can you hear me?

Eric Schmidt: I was just wondering, if this kind of thing happen in the future, what it immediately did was had many of our partners contacting us just to request copies, or make sure we were current, and if we knew that was coming, too; like if there was a request going out, if you could give us a heads up. That would make us be able to respond to those requests. All of our requests be like, what just happened? We are just making sure that we have the most current stuff. So, if you could just try to keep that in mind in case you need to do that, or issue another e-blast in the future. If it's EN related, they tend to have a lot of VR related, it helps to know what's coming.

Katie Striebinger: Yes, I agree. The EN should have that as part of the audit. I appreciate it. We will take that back. We will make sure in the future.

Jennelle Bratcher: Thank you so much, Eric, and thank you Katie. Do we have any more questions the chat? Or do we have any hands raised?

Katherine Jett: No questions on the phones or raised hands.

Jennelle Bratcher: Well, this is one last call, and if anybody has any additional questions, we do have 22 minutes. On behalf of TPM and the Social Security Administration, I would like to thank everybody for attending the call, for all of the information provided on this call and we will host our next call on April the 11, 2023. We will send out GovDelivery notices, but just know that the call will take place April 11, 2023. Thank you for attending. And have a good rest of your day. Our call has now concluded.