

1 Page

**Partnership Plus Agreement Regarding the Social Security
Administration Ticket to Work Program**

I. Introduction

The new "Ticket to Work" regulations that became effective on July 21, 2008 create an opportunity for the Department of Workforce Development (DWD), on behalf of the Division of Vocational Rehabilitation (DVR), and DONA NOBIS PACEM COACHING, hereinafter referred to as the Employment Network (EN) (collectively, the parties), to improve employment outcomes for beneficiaries of Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI). This agreement establishes a "Partnership Plus" program.

II. "Partnership Plus" Program

A. Purpose

The purpose of this Partnership Plus program is to develop an agreement between the parties under the Social Security Administration (SSA) Ticket to Work Program. This partnership is proposed for instances where a Ticket Holder seeks DVR assistance, the Ticket is placed "In-Use SVR", and the Ticket Holder is served under the Cost Reimbursement payment option. The proposed agreement establishes the basis for coordination of vocational rehabilitation services under the Rehabilitation Act with Individual Work Plan (IWP) services under the Ticket to Work Program. This proposed partnership agreement would not preclude the parties from entering into an individual agreement for services for a specific consumer.

The Partnership Plus program is intended to:

- Build on and strengthen the existing partnership around the provision of employment services for DVR consumers.
- Ensure best practices and ethical standards are maintained and that the DVR consumer's (Ticket Holder) rights and informed choices are respected.
- Provide the Ticket Holder with coordinated and seamless service transition between the parties.
- Maximize reimbursement received under the Cost Reimbursement program and milestone/outcome payment systems available under the Ticket to Work Program.

2 Page

B. Roles and Responsibilities

DVR will register a Ticket as "In-Use SVR" with the Ticket Program Manager (TPM) for all DVR consumers who use their Tickets under this partnership while the DVR case is open. Once the consumer is successfully employed at Substantial Gainful Activity (SGA) or has the likelihood that SGA will be achieved within the next several months, DVR will assist the consumer, with their full informed choice, involvement, and consent, to transfer their Ticket to an SSA- approved Employment Network (EN) when the DVR case is closed.

DVR:

1. Based on the order of selection and appropriateness of services, DVR will identify potential Ticket Holders with a high likelihood of reaching SGA.
2. For known Ticket Holders, DVR's wait list and closure letters will contain referral information to the Ticket Program Manager (TPM) for the Ticket program.
3. DVR will open cases as appropriate and explain the Ticket and Partnership Plus process. DVR will review with each consumer determined eligible for vocational rehabilitation services their options under the Ticket Program including the following:
 - General information regarding the options for using the Ticket and information on how to contact the TPM for the Ticket to Work and Self-Sufficiency Program to obtain information on approved employment networks.
 - Partnership Plus option: inform the consumer that they are signing the IPE with the understanding that the Ticket will be considered "In-Use SVR" at DVR; followed by the option to assign the Ticket to an EN based on informed choice once the DVR case is closed.
 - Benefits analysis services as needed and when appropriate to the IPE goals.
4. When a Ticket is made available for "In-Use SVR" assignment with DVR following the development of an approved EN-IWP and Ticket assignment to the EN and the Ticket Holder is subsequently referred to DVR for services, the EN will contact TPM to unassign the Ticket. When the Ticket is put "In-Use SVR", the IWP services developed but not completed by the EN may be purchased from the EN as the consumer's provider of choice if those services are also deemed appropriate to the DVR employment plan. DVR will develop and maintain an Individualized Plan for Employment (IPE) on consumers in the Partnership Plus agreement with the EN as appropriate.
5. At the time of IPE service invitation, DVR will complete the electronic process to place these Tickets "In-Use SVR" with TPM for all consumers who choose to use their Ticket under this Partnership.

3 Page

6. When purchased services are needed (e.g., situational assessment, job development, and/or job training), DVR will refer and authorize to an appropriate vendor of the consumer's choice according to DVR's typical processes and procedures. Once the consumer's employment is stabilized and the DVR case is ready for closure, DVR will electronically report the case closure to TPM, releasing the Ticket for assignment to an EN, and will assist the consumer, with their full choice and involvement, to assign their Ticket to the most appropriate EN for follow along services at the time of case closure. To assure consumer informed choice, DVR will also provide information on accessing available Employment Networks via the TPM website (<https://choosework.ssa.gov/>).
7. At the time of case closure, if the EN previously referred the Ticket Holder to DVR, and DVR put the Ticket "In-Use SVR", DVR will refer the consumer back to the EN as well as provide the consumer with information on how to access additional ENs via the TPM website. DVR will provide, with appropriate consumer consent, a copy of the closure letter to the EN to facilitate the return as an EN. The closure letter will contain the closure date, closure status as successfully employed, and note the potential for post-employment services. If the consumer chooses to assign their Ticket to the EN, additional DVR service information may be provided to the EN in accordance with the consumer's informed consent.

For Ticket holders, who through informed choice, choose to assign their ticket to the EN at the time of closure and did not have a previous relationship with the EN, DVR will provide a copy of the closure letter and additional DVR service information in accordance with the consumer's informed consent.

DVR will request that the Ticket holder sign a consent form to exchange specified information between the EN and DVR.

8. DVR will bill the Social Security Administration (SSA) for all appropriate cost reimbursement expenditures incurred under this agreement.

The Employment Network (EN)::

1. The EN will ensure that Wisconsin Ticket Holders who are within their first 12 months of SGA level wages and who have expressed an interest in the EN's services, are asked whether they are currently receiving DVR services or have received DVR services at any time since 2007. The EN will check with the TPM to determine if a cost reimbursement claim has been made.

If no claim is on record, and the Ticket Holder has self-identified as a current or former DVR consumer, DVR will share cost reimbursement claim activity status information with the EN, only if the EN provides evidence of Ticket Holder identity. The purpose of the shared information is to determine whether DVR intends to make a cost reimbursement claim on this Ticket Holder. The goal of this screening is to reduce the number of EN Milestone 1 payments subject to

4 Page

repayment. Through this agreement, DVR is able to share its intent to claim cost reimbursement because the Ticket Holder has self-disclosed to the EN that they had a case with DVR and providing this information will assist the consumer in receiving needed employment support services.

2. When the EN learns that an EN-assigned Ticket Holder is a common customer also accessing DVR employment services, or when the EN refers an EN-assigned Ticket Holder to DVR for services, the EN agrees to notify the Ticket Holder and the TPM of its intent to un-assign the Ticket. The purpose of the EN Ticket un-assignment is to allow the Ticket to be placed "In-Use SVR" with DVR for Ticket service coordination and Cost Reimbursement recovery under this agreement.

The EN may encourage the Ticket Holder to discuss their IWP services with DVR for the purposes of service coordination and/or consideration of inclusion of incomplete WIP services within the DVR employment plan. DVR may purchase services from the EN in accordance with the DVR fee-for-service payment schedule and technical specifications.

3. Once the DVR consumer case is closed, DVR has reported the case closure to TPM through an established electronic process and the consumer has assigned their Ticket to the EN, the EN will establish "Ticket Assignment" with the Program Manager. The EN is then able to submit for Phase 2 Milestone and Outcome Payments as achieved.
4. For a period of up to 12 months of SGA earnings, upon request from DVR, the EN will provide earnings verification information.

Joint Roles and Responsibilities:

1. DVR and the EN will establish Ticket liaisons who will work together as needed to ensure consumer's informed choice is respected. This will include informing consumers of the options spelled out under Section B, Roles and Responsibilities of this agreement.
2. DVR and the EN will ensure the delivery of information and appropriate employment supports to the Ticket Holder to maximize the use of Social Security work incentives with the goal of attaining and maintaining self-sufficiency through employment and earnings.
3. When referring a beneficiary to DVR, the EN will fill out the VR EN Referral form (Attachment 1-A)., The original forms will accompany the beneficiary to the local DVR office. If the EN originally referred the beneficiary to DVR using the VR EN Referral form, at the time of case closure DVR will provide the option, through informed choice, for the beneficiary to be refer back to the same EN by using the Referral to EN form (Attachment 1-B).
4. DVR and the EN will work together to determine the most efficient mechanism

5 Page

for tracking consumer wages and benefits status data for these two programs, i.e., Outcome/Milestone payments available under the Ticket to Work program and reimbursement payments under the Cost Reimbursement program which both depend on the accurate reporting of this data.

5. DVR and the EN will coordinate Ticket assignment and In-Use information in an effort to facilitate all the required reporting under this agreement to the TPM.
6. DVR will exchange information necessary for the provision of services with the EN without a release of information when a referral is made from DVR to the EN as a partnership plus EN on an open file under the administration of the program. If the file is closed, DVR will exchange basic information such as when the file closed, if an individual plan for employment was put in place, and if DVR has already or plans to submit a cost reimbursement claim to social security. This basic information will be provided only if the EN contacts the liaison with DVR, which is predetermined, and provides knowledge that the consumer has had a past file, the social security number of the consumer, and the name of the consumer. The EN understands if more than basic information is required on a closed file a release of information signed by the consumer will need to be sent to the DVR liaison."

III. Ticket Holder Rights and Responsibilities

Services provided or paid for by DVR entitle the Ticket Holder to all the protections available through the Rehabilitation Act of 1973 to include Client Assistance Program services. Consumer disputes with the EN shall follow administrative processes as appropriate. When Tickets are "In-Use SVR" with DVR with the consumers' knowledge of using these Tickets, these consumers will be informed by DVR of their responsibilities in relation to SSA's timely progress requirements and Medical Continuing Disability Review CDR protections. Nothing in this agreement will have an impact on a consumer's rights and responsibilities under the Ticket to Work Program.

IV. Evaluation

DVR and the EN will evaluate the effectiveness of the Partnership Plus service model created by this agreement six months after assignment of the first Ticket and annually thereafter to determine what adjustments are necessary.

Specifically, the parties will evaluate the following:

- The administrative burden associated with the Partnership Plus service model.
- Patterns or trends of Ticket Assignment.
- The equity and appropriateness of the payment provisions.
- The earnings and hours worked of consumers who choose to assign their Ticket.
- If consumer rights and choices are being respected under this agreement.

V. Terms of Agreement

6 Page

The terms of the agreement shall begin on the date of final signature and continue until replaced by a new agreement, terminated upon mutual agreement, or upon a thirty (30) day written notice of termination by either party. The parties may agree to amend the agreement at any time. However, such amendment shall not take effect until changes to the agreement are in writing and signed by both parties.

A. General Statement

- The agreement will not in any way impede any of the parties from entering into other agreements regarding the Ticket to Work and Work Incentives Improvement Act of 1999.
- Nothing in the agreement shall in any way take precedent over the requirements of the Rehabilitation Act of 1973 as amended.
- Nothing in the agreement shall interfere with the existing fee-for-service agreement that the EN has with DVR.

Signature: *Beth Leannah Simons*
 Name: *Beth Leannah Simons*
 Title: *Job Developer*
 Agency: *DNP Coaching*

5-17-23
 Date

DocuSigned by:
Delora Newton
3583CE890AC6143...
 Delora Newton
 Administrator
 Division of Vocational Rehabilitation

5/17/2023
 Date