STANDARD OPERATING PROTOCOL

Subject: Eligibility Determination Extension

SOP Number: 2015-RSA – EDE-SOP-001

Responsible Program or Office: Rehabilitation Services Administration – Client Services

Effective Date: June 8, 2015

Number of Pages: 5

Cross References, Related Policies and Procedures, and Related Documents:
Eligibility Determination and Eligibility Determination Extension Procedures

A. Purpose: This protocol provides guidelines in requesting extension of eligibility determination beyond 60 days due to exceptional and unforeseen circumstances beyond the control of the agency.

B. Responsible Staff: Vocational Rehabilitation (VR) Specialists shall draft a detailed explanation of why an extension for eligibility determination is needed and shall submit it for supervisory review and approval.

C. Standard Operating Protocol:

1. The VR Specialist may request an extension of eligibility determination if due to exceptional and unforeseen circumstances beyond the control of the agency, there is not enough information about the person’s disability(ies) and/or its impact on the person’s capacity for employment and eligibility cannot be determined within 60 days of application.

Examples of exceptional and/or unforeseen circumstances include but are not limited to:

<table>
<thead>
<tr>
<th>DOCUMENTATION ISSUE</th>
<th>AGENCY ISSUE</th>
<th>INDIVIDUAL ISSUE</th>
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<tr>
<td>There is lack of documented medical or psychological records to support the person’s reported disability</td>
<td>RSA may lack a service provider for a necessary evaluation or service</td>
<td>Availability of the person</td>
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<tr>
<td>a. More time is needed to obtain medical records; b. Waiting for scheduled medical and/or psychological evaluation.</td>
<td>RSA does not have a contract with a vendor for a certain evaluation or service needed for eligibility determination</td>
<td>The person is unavailable to participate or too ill to attend a scheduled medical or psychological evaluation.</td>
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2. Eligibility Determination Extension shall not be applied to recipients of Supplemental Security Income (SSI) and/or Social Security Disability Income (SSDI) as they may be determined presumptively eligible. The award letter from SSA or acceptable proof of receipt of SSI and/or SSDI shall be filed in the record of services for presumptive eligibility. Presumptive eligibility cannot be applied if there is no proof of receipt of SSI and/or SSDI and which may potentially make the person qualified for eligibility determination extension.

3. The VR specialist must make a good faith effort to determine actual number of days needed for the extension and document this accordingly in the Eligibility Determination Extension Justification form (i.e. person is waitlisted for an evaluation and is scheduled at a certain date and results will not be available till three weeks after) The Eligibility Determination Extension (EDE) Justification form can be accessed through the Eligibility Determination Worksheet. The remainder of the Eligibility Determination Worksheet shall be left blank at this point.

4. The VR Specialist shall document in the Eligibility Determination Extension Justification form:
   a. Justification for extension;
   b. Any and all exceptional and unforeseen circumstances that prevent a timely eligibility determination within 60 days; and
   c. Indicate the specific information and source needed to determine eligibility that will be collected during the extension.

5. The VR Specialist must secure prior approval of the supervisor on or before the 45th day from the person’s application date before discussing an extension of eligibility with the person. The VR specialist shall notify the supervisor by email for the extension approval request. The supervisor shall review justification for the extension request and approve or disapprove accordingly within 24 hours of request. The supervisor shall indicate extension approval and date the supervisor signature block in the Eligibility Determination Extension Justification form.
6. If the request for extension is made by the VR Specialist after the 45th date from the person’s application date, approval from the client services manager shall also be required aside from the supervisor’s approval.

7. The approved Eligibility Determination Extension Justification form shall then automatically launch the Eligibility Determination Extension Letter.

8. The eligibility determination extension (EDE) letter detailing the reason for the extension and the new extension date shall be provided to the person on or before Day 47. **The person must acknowledge and sign the eligibility extension letter to confirm his or her agreement to the extension.** The VR specialist shall ensure that a signed copy is filed and uploaded in the record of services before the 60th day is reached.

   The VR specialist must employ the most expeditious way to obtain person’s signature thru:
   a. Setting an appointment with the person to discuss an extension and obtaining signature (preferred method); or
   b. Emailing, mailing or faxing the Eligibility Determination Extension Letter as an alternative if (a) is not possible.

9. The signed copy of the eligibility determination extension letter shall be scanned and uploaded to System 7 upon receipt. The VR Specialist shall indicate that the signed copy has been scanned and uploaded in System 7 by marking the Client Signature date field **to reflect the date the client signed the letter** in the Eligibility Determination Extension Letter. This will be the time that System 7 will officially start the extension and the extension date will pre-populate the Eligibility Extension date field in the Eligibility Determination Worksheet.

![Figure 2: Screenshot of bottom portion of EDE letter with Upload Function](image-url)
10. The VR Specialist shall gather and evaluate the required information that would be sufficient to determine eligibility.

11. The Eligibility Determination Worksheet in System 7 shall be completed once there is sufficient information to determine eligibility.

12. However, if the signed eligibility extension letter has not been obtained between Days 50-52, the VR specialist shall make arrangements to meet with the person to discuss the extension and obtain signature on the eligibility determination extension letter indicating the person’s agreement.

13. The VR specialist shall send a seven-day Notice of Pending Closure to the person on Day 53 after all efforts to contact and locate the person have been exhausted to no avail and documented.

14. The case shall be closed on or before Day 60 if the person does not reply to the Notice of Pending Closure and there is insufficient information to determine eligibility.

15. The VR Specialist shall complete the VR Case and Closure Information form in System 7 and indicate the reason for closure and mail a Notice of Case Closure – Lack of Participation letter to the person.

Attachments:
1. Eligibility Determination Extension Process Map
2. Eligibility Determination Extension Justification
3. Eligibility Determination Extension Letter
4. Notice of Case Closure – Lack of Participation
Figure 3: Process Map of EDE for System 7