



**SUPERCEDED BY 2015 ELIGIBILITY DETERMINATION EXTENSION SOP
 (2015-RSA-EDE-SOP01)**

STANDARD OPERATING PROTOCOL	
Subject: Eligibility Determination Extension	SOP Number: 2014-RSA – EDE-SOP-002
Responsible Program or Office: Rehabilitation Services Administration – Client Services	Effective Date: June 17, 2014
	Number of Pages: 4
Cross References, Related Policies and Procedures, and Related Documents: Eligibility Determination and Eligibility Determination Extension Procedures	

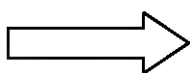
- A. Purpose: This protocol provides guidelines in requesting extension of eligibility determination beyond 60 days due to exceptional and unforeseen circumstances beyond the control of the agency.
- B. Responsible Staff: Vocational Rehabilitation (VR) Specialists shall draft a detailed explanation of 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:

DOCUMENTATION ISSUE	AGENCY ISSUE	INDIVIDUAL ISSUE
There is lack of documented medical or psychological records to support individual’s reported disability	RSA may lack a service provider for a necessary evaluation or service	Availability of individual
<ol style="list-style-type: none"> a. More time is needed to obtain medical records; b. Waiting for scheduled medical and/or psychological 	RSA does not have a contract with a vendor for a certain evaluation or service needed for eligibility determination	Individual is unavailable to participate or too ill to attend a scheduled medical or psychological evaluation.

evaluation.		
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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 individual qualified for eligibility determination extension.
3. Request for Eligibility Determination Extension shall be submitted for supervisor approval on or before the 45th day from the individual's application date.
4. The VR specialist must make a good faith effort to determine actual number of days needed for the extension and document this accordingly (i.e. individual is waitlisted for an evaluation and is scheduled at a certain date and results will not be available till three weeks after) . ~~A reasonable *eligibility extension date* must be on the field in the Eligibility Determination Worksheet (EDW) in System 7 to request for eligibility determination extension~~ (See Figure 1 below). The individual applying for services must agree to the proposed date as it effectively defers eligibility determination until that agreed-upon date. The remainder of the Eligibility Determination Worksheet shall be left blank at this point.



The screenshot shows a web browser window displaying the System 7 EDW form. The 'Cause 1' field is filled with 'Arthritis and Rheumatism'. Below it, 'Presumptively Eligible?' is set to 'N'. The 'Benefits Counseling: Worker Assignment' section includes fields for 'Assigned to:', 'Start Date:', 'End Date:', and 'Primary?'. A 'Resend Assignments' button is visible. The 'Extensions:' section has 'Eligibility Extension Date 1:' set to '01/16/2014' and an 'Open Extension Letter' button. The 'Eligibility Justification:' section is partially visible at the bottom.

Figure 1: Eligibility Extension Date field on System 7 EDW

5. 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.

6. ~~The VR Specialist must secure prior approval of the supervisor before discussing an extension of eligibility with the individual. 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 Worksheet.~~

The screenshot shows a Microsoft Word document titled 'System 7 redesign - Eligibility Determination Worksheet for EDE.docx'. The main content is a form with the following elements:

- ELIGIBILITY DETERMINATION WORKSHEET** (Section Header)
- Extensions:** (Section Header)
- Eligibility Extension Date 1:
- APPROVE DISAPPROVE
-
- Signed letter Filed? YES NO

Two boxes on the left contain the numbers '6' and '8'. Arrows from box '6' point to the 'Eligibility Extension Date 1' field. Arrows from box '8' point to the 'Signed letter Filed?' field.

Figure 2: Approval block for supervisor and filing date block

7. The eligibility determination extension (EDE) letter detailing the reason for the extension and the new extension date shall be provided to the individual on or before Day 47. *The individual 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 in the record of services before the 60th day is reached.

The screenshot shows a Microsoft Word document titled 'Letter - EDE.docx'. The main content is a signature block with the following elements:

- If you disagree, you may appeal the decision by selecting one the options in the enclosed Appeal Rights.
- _____
Vocational Rehabilitation Specialist
- Conforme:
- _____
Client name
- _____
Date

An arrow points from the left towards the signature block.

Figure 3: Signature Block for Client in the EDE letter

The VR specialist must employ the most expeditious way to obtain individual's signature thru:

- Setting an appointment with the individual to discuss an extension and obtaining signature (preferred method); or

- b. The Eligibility Determination Extension Letter may be emailed/ mailed/ faxed as an alternative if (a) is not possible.
8. 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 filing date block in the Eligibility Determination Worksheet (See Figure 2 above). This will be the time that System 7 will officially start the extension.
9. The VR Specialist shall gather and evaluate the required information that would be sufficient to determine eligibility.
10. The Eligibility Determination Worksheet in System 7 shall be completed once there is sufficient information to determine eligibility.
11. 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 individual to discuss the extension and obtain signature in the eligibility determination extension letter indicating the individual's agreement.
12. The VR specialist shall send a seven-day Notice of Pending Closure to the individual on Day 53 after all efforts to contact and locate the individual have been exhausted to no avail and documented.
13. The case shall be closed on or before Day 60 if the individual does not reply to the Notice of Pending Closure and there is no sufficient information to determine eligibility.
14. The procedures for case closure before or during evaluation (Status 08) shall be followed as outlined in the RSA Policy Manual Section VIII-2.

Attachments:

1. Eligibility Determination Extension Process Map
2. Eligibility Determination Extension Justification
3. Eligibility Determination Extension Letter