

Eligibility Determination

Required Documentation

The following documentation must be uploaded as a program document prior to submitting the certificate of eligibility (COE) for review.

- Eligibility Aid
- Medical Documentation
- SSA benefits verification, if presumed eligible
- Individual Education Program (IEP)/504 Plan, if in high school

If the client provides medical documentation during the intake meeting, this information must be uploaded as a program document.

If needed, counselors will send ROIs to support staff to send to medical providers. Once medical documentation is received, support staff uploads into the CMS and sends VRC a work request (WR).

- Tracking Inbox
- Work Request
- New
 - Task
 - Priority
 - Assign to
 - Due date
 - Instructions

The VRC receives an email with subject line – Work Request Assigned to you. The email will state there is a WR assigned to you with a direct link to the WR to complete the eligibility.

Completing the Disability Page

Using the assessment (eligibility aid/IEP) completed at the application meeting, complete the Disability page.

- Disability Level Order Date: Date entered/updated

- Disability Priority: Automatically calculated
- VR client can be expected to require multiple VR services over an extended period of time:
 - Yes – individual is eligible for VR services
 - No – individual is not eligible for VR services
- Functional Capacity Areas: Communication, Mobility, Self-Care, Work Skills, Interpersonal Skills, Self Direction, and Work Tolerance
- Counselor Rationale-Reports used (eye report, IEP, client interview, etc)
- Eye Report:
 - Yes – if eye report uploaded in program documents
 - No – if no eye report is received in the required timeframe or presumed eligible (SSA benefits documentation must be uploaded in program documents)
- Diagnosing Doctor: Name of doctor, credentials, date of report, and facility
 - Required for all determination of eligibilities/ineligibilities
 - If presumed eligible, state documentation used to support (BPQY, SSA award letter based on blindness/visual impairment, etc) and date of the documentation used.
- Diagnosis: Cause of blindness, best corrected visual acuities and/or peripheral field loss, prognosis, etc
 - Required for all determination of eligibilities/ineligibilities
 - Includes secondary diagnosis if supported by medical documentation
 - Include self-reported diagnosis stating date of self-report/interview (e.g. self-reported on 5/1/24 during intake meeting, has seasonal depression and anxiety)

Counselor saves the form

Completing the Certificate of Eligibility (COE)

- COE Status: This status updates throughout the eligibility approval process.
- Eligibility Date: Date entered/updated
- Presumptive Eligibility:

- Yes – if client is receiving SSA benefits and VRC has uploaded benefits documentation in lieu of medical documentation for eligibility.
- No – when SSA documentation is not used for eligibility.
- Establish Eligibility:
 - Yes – if you are establishing eligibility.
 - No – if you are not establishing eligibility.
- Eligibility:
 - Yes – if determining individual eligible for VR services
 - No – if determining individual ineligible for VR services
- Eligibility Determination Extension: Date eligibility is extended to (not to go over 30 days from the 60-day requirement)
 - Extension form must be uploaded in program documents with program note to support the extension rationale and discussion with client.
- Experiences the following substantial impediments to employment:
 - Summarize each functional capacity area established on the disability screen.

The disability(s) result(s) in a substantial impediment to employment because it/they hinder(s) the consumer’s ability to:

- Prepare for employment because:

- Entering into employment because:

- Engage in employment because:

- Advance in employment because:

- Retain employment because:

The consumer requires services from VR in order to:

- Prepare for employment because:
 -
- Resulting from these impediments, the following VR services are required:
 - List VR services required to address substantial impediments to employment.
- Benefits/Disability Information
- Primary Disability
- Primary Cause/Source
- Secondary Disability – must have supporting documentation
- Secondary Cause/Source
- Additional Disability – must have supporting documentation
- Additional Cause/Source
- Additional Notes
- Send to Supervisor for Review:
- Choose supervisor from the drop-down box.
- Save.

VRC receives an email that the COE is pending review.

Once the supervisor approves the COE, the VRC receives an email that the COE has been approved. The email has a direct link to the client's record.

- Go to the COE page.
- Go to the pencil icon at the bottom of the page and enter password.

VRC is to contact the individual to inform them of the eligibility determination and set up a meeting to complete the Individual Plan for Employment.

Completing the Program Note

- Click on Program Note
- +New
- Complete eligibility case note to include date contacted client, determination shared, and scheduled IPE development meeting.

Generate Eligibility Letter

- In the COE, click on button - Generate Eligibility Letter

- A Program Document will automatically create in new screen
- VRC edit the letter based on the meeting time set up for IPE development discussion.
- Save
- VRC send support staff a work request to send the letter to the client