

Welcome

Nate Arnold welcomed everyone to the call.

301 Medical Cases

Nate Arnold noted that ORDES has received a number of Help Desk questions regarding Social Security's Section 301 cases, which allow continued benefit payments after benefit cessation under certain circumstances. Social Security benefits may stop if:

- The beneficiary is no longer disabled due to medical improvement
- Due to the age 18 redetermination process eligibility ends because the beneficiary does not meet the adult requirements for disability

However, if the person is receiving services, a month before the benefit cessation, from a State Vocational Rehabilitation (VR) agency, an Employment Network (EN), or an Individual Education Plan, or has a Plan for Achieving Self Support in place, they may be considered for Section 301 eligibility and continued receipt of benefits. Approved 301 cases are eligible for State VR agency cost reimbursement. Section 301 rules are covered in the Social Security Administration's (SSA) Red Book. ORDES has reached out to other SSA 301 case experts for technical assistance.

301 Case Process Presentation: Highlights

- During the presentation, Nathaniel Williams of SSA's Office of Disability Operations (ODO) provided a step-by-step explanation of the 301 case process and case notifications for both Title 2 and Title 16 cases.
 - 301 case determination process is managed through various SSA offices including the SSA field offices and SSA's Office of Disability Operations.
 - Nate Arnold stated that currently all 301 case notification to State VR agencies happen through the SSA field offices. Someone at the State VR agency should receive a notice from the SSA field office but the notice recipient could vary at each State VR agency. ORDES becomes aware of a 301 case late in the game after the State VR agency and SSA field offices, DDS and ODO have been involved.

- In the future, ORDES will send a copy of the 301 determination to the State VR agency Cost Reimbursement Coordinator at the time ORDES receives the information.
 - Section 301 eligibility ends when the individual stops making progress or participating in the VR program due to case closure. Eligibility can also end when SSA determines that continued participation in the VR program does not increase the likelihood that the individual will not return to the disability roles.
- State VR agencies cannot be paid for a regular Substantial Gainful Activity (SGA) based claim and a 301 claim for the same period of service. In response to a question about combining sequential claim periods for a person who is served multiple times, Mr. Arnold clarified that if the 301 claim period is a separate period of service, and if there is connectivity between services and the employment outcome, the State VR agency can file an SGA and a 301 case cost reimbursement claim on the same beneficiary.
 - The cost reimbursement payment period on a 301 case ends the month before benefits terminate. There could be a lag period between when a case is closed and the benefits are terminated.
 - There is no requirement for nine months of earnings for a 301 case. Cost reimbursement claims on a 301 case must be filed within 12 months of the State VR agency case closure. Cost reimbursement coordinators are encouraged to check the box on the front of the 199 form that the claim is a 301 case to aid SSA in processing the claim.

General Announcements and VR Claim Issues

- Danielle Armstrong noted that many of today's chat questions relate to SSA Field Offices. The chat questions have been recorded and will be sent to the field offices for a response.
- She shared an update on the VR handbook which is complete and under internal management review with the expectation that it will be released to State VR agencies shortly. Following release, ORDES welcomes feedback on the VR handbook information clarity and format.
- Pending claims list and the iTOPSS transition. A lag in the SVRA's pending claims list is likely to occur with the transition and conversion of data and claims to iTOPSS.



More information will be available in the future. Once the transition is completed, State VR agencies will have the claim upload view as SSA sees it. In the long run, all of the claim information discrepancies will be eliminated.

- ORDES received a request about having a separate call for VRENS. If you are a VREN, please let the Help Desk know if you want a separate call and the topics you would like to discuss, so we can determine the separate call interest among VRENS.

Cost Reimbursement Updates

- No cost reimbursement updates.

Portal Updates and Information

- Katie Striebinger noted that cost reimbursement processing will be added to the portal this fall. State VR agencies can submit cost reimbursement claims via the portal when the feature is fully functional. A pilot of this feature will occur in October. More information on the pilot will be available during the July All VR Call.
- Timely Progress Review (TPR) questions will be covered during the August VR call. Submit your TPR questions to the VR Help Desk. This is not a portal training.

Reminders:

- Youth-in-Transition WISE webinar on Wednesday, June 22. Interested participants can register for the webinar at the Choosework.net website.

The full transcript and audio from the All VR Call are available at <https://yourtickettowork.com/web/ttw/events-archive>.

The next All VR Call will be held **Tuesday, July 12, at 3 p.m. ET.**

