**Rachel Anderson:** Today is the seventh training in our eight-part series going over the Case Service Report RSA-911 for the PD 19-03 that's going to go into effect on July 1, 2020. Here's the training series objectives. We obviously spent a lot of time going over the intent of PD 19-03 and all the changes. We've also covered the whys behind the implementation and how states should interpret some of these data elements. We're going to share a couple of FAQs today, in addition to some examples, and hopefully, we've answered the majority of your questions throughout the training. Today, we have Rimal Desai with us. He's the Management and Program Analyst with RSA. He also previously presented with us during the Pre-Employment Transition Services training. And my name is Rachel Anderson, and I am with the WINTAC.

So today, we're going to go over a couple of things. We're going to discuss the new data elements in PD 19-03. We have discussed some of them over -- or throughout the series, but today we wanted to make sure we pointed out all the new data elements and give you a little bit of detail that you need to know about them. And then, also, there are some other need-to-knows. Now, we've gotten a lot of questions from you all -- thank you very much -- about the previous six trainings. And so, we've developed kind of an FAQ session that we want to clarify and answer questions that we've received from everybody. And hopefully, that will get everybody on the same page and ready to implement by July 1.

Today is -- we're going to talk about the whys on some of the added changes, and we also -- we didn't have a lot of new tools and resources for you today. But hopefully, the FAQ will be an additional resource that will help you get along. So I'm going to hand it over to Rimal, and he's going to start us off with talking about the changes.

**Rimal Desai:** Thanks, Rachel. Thank you for joining us on our seventh webinar on RSA-911. Today, as Rachel mentioned, we are going to talk about new data elements, and we will address some of your questions. Let's go on, New Data Elements. Here are the -- we added a few data elements at Application at Exit at IPE. Here are the At Application data elements. Data Element 394: Monthly Public Support at Application; Data Element 395: Medical Insurance Covered at Application At Exit; Data Element 396: Monthly Public Support at Exit; Data Element 397: Medical Insurance Coverage at Exit. And At IPE, we added Data Element 398: Date of Initial IPE; Data Element 399: IPE Development Extension; Data Element 400: Enrolled in a Recognized Secondary School Equivalency Program; and Data Element 401: Date Completed During Program Participation in an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment. And we are at Data Element 402 through 407, Work-Based Learning Experience training service elements.

All right. Next slide. Let's talk about At Application data elements. So At Application, we added Data Element 394: Monthly Public Support at Application. With this element, agency will report individual's public support at application. If the individual receives more than one type of public support, use semicolon between each type. If the individual is not receiving any public support, please code this element 0. Agencies should not use code 0 with any other codes. For example, 0;2 or 3;0. Let's say, if the individual is receiving TANF and other public support at application, agency would code this element as a 3;4. Agencies should not use leading zeros for coding purposes. For example, 03;04. That would trigger an error during edit checks.

Next slide. Let's talk about Data Element 395: Medical Insurance Coverage at Application. With this element, agency will report individual's medical insurance coverage at application. If the individual is -- has more than one type of medical insurance, please use a semicolon between each type. In this data element, you can -- agencies can report a maximum of three types of insurance providers. And as I mentioned before, agencies should not use leading zeros when coding more than one insurance provider and should not use zero with any other codes. I also wanted to add that all elements at application are not updatable. Agencies should not update this element unless there was a mistake during the intake process.

Next slide. Let's talk about Data Elements At Exit. Data Element 396: Monthly Public Support at Exit and Data Element 397: Medical Insurance Coverage at Exit. These both elements will be reported at exit and should be coded as I mentioned in previous slides. It should not be coded -- codes mixed with zeros and should not use leading zeros when coded. Again, these data elements are not updatable. Agencies should not update these elements unless there was a mistake when it was first reported. Rachel?

**Rachel Anderson:** Thanks, Rimal. Okay. Now we are going to talk At IPE Data Elements. So a couple of the added data elements are 398, which is the Date of Initial IPE, and 399, which is IPE Development Extension. Now, we're really excited about this added data element because it's going to give us a lot more information about what's going on in your cases. So 398, you know that before we talked about Data Element 48 was the amended IPE. That's a deleted data element. So now we've got 398, which is going to capture the Date of Initial IPE only. Now, remember, this is one of those places and times that you have to have -- the date must be verifiable through supporting documentation. And then, 399, this is where you can capture the IPE Development Extension, similar to the eligibility extension. Now, just to make it clear -- oh, this one also has to have -- be verifiable through supporting documentation. So make sure that you have whatever your policies are for having an extension in place in the file. Now, keep in mind Data Element 399 is the date the VR agency and eligible individual agreed to the extension. So extend the IPE beyond the 90 days, not the new date that the IPE is expected to be completed. The date the initial IPE is completed is reported in 398, even if this happens before 90 days or 90 days with an extension.

Next is Data Element 400. This is Enrolled in a Recognized Secondary School Equivalency Program. We did talk about this pretty thoroughly in Training #5, so we're not going to go over it again. But this is an added data element, so please reference the Training #5 where we talked about Credential Attainment and Measurable Skill Gains.

We've also got Data Element 401, which is the Date Completed During Program Participation in an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment. Again, this one is a new one. This is a really great data element, so we want to make sure you have all the details and how to -- and when to use it. So if you don't remember, please go back to Training #5 for Credential Attainment and Measurable Skill Gains.

And then, we are going to talk about At Time of Training data elements. So Work-Based Learning Experience. So this -- these are the new data elements that Rimal discussed at the beginning. This is Data Element 402 through 407. So this is where we're going to be able to catch all those extra Work-Based Learning Experiences that right now you don't really have a place to document. So beginning on July 1 of 2020, the RSA 9-11 and PD 19-03 will permit VR agencies to report apprenticeships that are not registered apprenticeships. We already know that there's a place that you document formal registered apprenticeships and internships, paid or unpaid, and other Work-Based Learning Experiences that are provided to VR program participants. Now, dependent upon the VR agency's policies and following RSA-TAC-17-01, these internships and work-based learnings may result in an MSG: Training Milestone. Now, in order for that to happen, your agency needs to make sure that the internship or Work-Based Learning Experience must be intended to help the participant reach his or her IPE goal, like an on-the-job training. So if a participant learns basic work skills or experiences in a variety of employment settings that are not directly related to the IPE goal, then this would not count toward an MSG. So think about it as a pre-employment transition service. If you provided that similar of a Work-Based Learning Experience that's general in nature, maybe teaching you basic work skills, but the person happens to be a 35-year-old adult, that's okay. You would document it as a Work-Based Learning Experience, but you're not going to document that as a credential or a measurable skill gain because it's not related to their IPE goal and it's not a formal training like an OJT. So just keep that in mind. This is where you can document all of those experiences, but only sometimes will you be able to document them as an MSG. So a little bit more detail, like I said before, is in Training #5 where we discussed thoroughly Credential Attainment and Measurable Skills Gains, but this is an added data element that I think are going to be really useful for agencies.

Now, another thing to keep in mind is you've got -- let's see, one, two, three, four, five, six -- six data elements for Work-Based Learning Experience. In our Training #2, we talked about in detail how to report expenditures for VR services. So this is just your reminder, but I am encouraging you to go back to Training #2 as well. If you provide a Work-Based Learning Experience in-house by VR agency staff that is the only data element that you have to report. It would be Data Element 402. However, if you provided it by Agency Purchase, then you're required to report three different data elements. So Data Element 403 would be that it was provided and [inaudible] by part -- by Agency Purchase, 404 would be the Purchased Service Provider Type, and 405 would be the Amount of VR Funds Expended. And then, if it's provided by comparable benefit, remember that there are two data elements you have to report for a comparable benefit. 406, in this case, would be that it was provided by comparable benefit. 407 would be the provider type. So again, just keep in mind that depending on the way that you provide that service, there may be additional data elements that you have to report.

And then, just a little reminder, just because I might have caused a little bit of confusion on the previous slide. So Work-Based Learning Experience added data elements 402 through 407 are not used to report pre-employment transition services. So you're still going to use all the appropriate pre-employment transition services data elements. This is for anyone else that's receiving a Work-Based Learning Experience that's not a pre-employment transition service.

Okay. So now we're going to get into the FAQ portion. So over the course of the last six trainings, we've had some really great outreach from all of you. Some of you have come to the WINTAC. Some of you have gone to RSA. Some of you have come to both. So we tried to compile the most frequently asked questions related to the training series only. We obviously get a lot of questions that are outside of this training, but we're trying to keep it just to the scope of this training. So we've listed them here for you. We are probably going to just read them for you. And if you have any additional questions outside of these clarifications, please reach out to us directly. So I am going to hand it off to Rimal to start.

**Rimal Desai:** Thanks, Rachel. Let's look at the Question 1, Edit Checks. The question is, what are the RSA's plans to update RSA-911 edit checks, based on PD 19-03? So RSA will release new edit checks for PY 2020 Quarter 1 before the start of PY 2020. We are hoping to release this in May 2020. And new edit checks will account for data change and new data elements. I just wanted to add that new edits will account for all deleted elements if they are populated or -- also, new edits will account for new and deleted codes for data elements. Please refer to the Crosswalk that RSA released a couple months back. And also, new data elements will have new edits associated with it. For example, all IPE data elements edits will now tie with Data Element 398: Date of Initial IPE.

Next question. All right. Question 2, Legacy Data Elements. How do VR agencies handle legacy data elements that have previously been reported in the case, but in PD 19-03, they have been deleted? Do these continue to get reported, or do we leave them blank as of July 2020? As I mentioned earlier, deleted data elements must be reported as NULL. If any of the data elements are populated for PY 2020 Quarter 1 submissions, the file will get rejected. Agencies can preserve the legacy data in their own system for their internal use. But for RSA-911 PY 2020 Quarter 1 submissions, those elements must be NULL. Rachel?

**Rachel Anderson:** Okay. Question number 3. So this is related to SOC codes. The question was, PD 19-03 implements the 2018 SOC codes. Are VR agencies expected to update open and closed cases (including post-exit reporting) with these SOC codes? The answer is that VR agencies should report all participants who exit on and after July 1, 2020, using the 2018 SOC codes at the time of exit and post-exit. Participants who exit before July 1, 2020, should be reported using the 2010 SOC codes. This also applies to the post-exit reporting of these participants. So just remember that if it's prior to July 1, you use 2010 because those will carry over with the participant. If it's after July 1, make sure everything is updated to the 2018 SOC codes.

Question number 4 is related to Customized Employment. The question was, in order for a VR agency to report Customized Employment services in the RSA-911, does the participant have to meet the definition of and be reported as Supported Employment? So this caused some confusion to a handful of you, so we just wanted to make it really clear that the answer is no. Depending on how VR agencies provide Customized Employment services, they may offer these services more broadly to participants who do not meet the definition of Supported Employment. So across the country, the implementation of Customized Employment varies, so we just wanted to make that clear that it depends on how you've implemented it. So keep in mind that in order to use Title VI Supported Employment funds for Customized Employment, it must be after the participant has begun working and meets the definition of Supported Employment. So in short, Customized Employment services may be provided with Title I or Title VI funds.

Next, we are going to talk about the student with disability questions. These are the ones that we've probably gotten the majority about, so I'm going to hand this over to Rimal.

**Rimal Desai:** Thank you, Rachel. Yes, as Rachel mentioned, most of the questions related to this series was how to report students with disabilities and what to do since there is no exit type in the new 911. So let's get to it. Question 5: Students with disabilities who are known to VR. So the questions is, what are the reporting requirements for students with disabilities who are known to the VR agency? And are VR agencies required to report on all those students with disabilities who are potentially eligible for VR services? And the answer is no. Agencies should only report students with disabilities who are receiving one of the five required activities. For example, if a student with a disability receives a Work-Based Learning Experience in Quarter 1, then VR agencies would start reporting on all required data elements for potentially eligible students with disabilities and would code Work-Based Learning Experience services element for that quarter. If a student with a disability does not receive any required services in Quarter 2, then the agency would only report the required data elements and leave all the services elements blank.

I just wanted to add a couple things about required elements. If individuals -- if students with disabilities start receiving pre-employment transition services, there are a few data elements that then need to be reported each quarter regardless if the individual is receiving services or not. Those are elements 5 - unique identifier; 6 – SSN; Data Element 8, Date of Birth; Data Element 10-14: Race; Data element 15: Ethnicity; Data Element 22: Students with Disabilities -- that we are going to talk about more later on. And Data Element 96: Start Date Pre-Employment Transition Services. And there are Data Element 97-124 are the five required service data elements. The agency would code them as student with disability will receive services in the particular quarter. I also wanted to add that once the potentially eligible student with disability receives any of the five required services, they would continue to be reported until they are no longer eligible to receive pre-employment transition services. This occurs when they no longer meet the definition of student with disability. For example, if they are -- age out from the age range or are no longer enrolled in an education program. Next slide, please.

Question 6, this is regarding coordination activities. If a VR Counselor attends an IEP meeting (as a Pre-ETS Coordination Activity) for a student who is potentially eligible and VR agency does not go by any of the required Pre-ETS activities, is agency required to report that this student with a disability on RSA-911? And what if the parent or student opts not to accept pre-employment transition services and does not sign consent for VR to get data elements needed to report? The answer is no. If Pre-ETS are -- pre-employment transition services are offered to students with disabilities but the parent does not consent or the student/parent deny services, there is no requirement for the VR agency to report the student with disability on RSA-911. If VR Counselor is attending the IPE meetings as a pre-employment transition services coordination activity, this should be documented through the agency's mechanism for tracking staff time, but it's not reported on the RSA-911 because the VR agency did not provide one of the five required activities. Rachel?

**Rachel Anderson:** Thanks, Rimal. Okay. Question number 7. We get this question a lot related to high school diplomas on the IPE. We've also gotten them a lot as a result of this training. So we did want to clarify for everyone. So in regard to reporting Data Element 78, if a participant is enrolled in secondary education at the time of IPE, do VR agencies need to specifically state that completing secondary education is a goal on the IPE or is it implied? So the answer is -- you know, a lot of people don't realize that this data element is applied to the credential attainment indicator. And obviously, we went over that in the training series, but I just wanted to make that clear. So the guidance in TAC-17-01 states that all participants who are enrolled in secondary education and who have the attainment of a secondary school diploma or its equivalent identified on their IPE, Data Element 78 is where VR agencies report that completing secondary education is a goal for the participant on his or her IPE. So Data Element 78 is simply where you're telling RSA that, yes, it is a goal on the IPE, or no, it's not a goal on the IPE. Now, the word "goal" is tripping some people up. So there's no prescribed way on how this has to be on your IPE. It can be an objective. It can be a service. It can be outlined however your IPEs are formatted. So that has caused some confusion. If you need any examples, let us know. But there's no prescribed way how to have it as a goal on the IPE. It just has to be on there, and then that's when you use Data Element 78 to tell RSA that it is or is not a goal. So a student might be -- the reason it has to be on there is because a student might be pursuing a special ed certificate, where you would document code 2 in 78 because they wouldn't have the goal of high school diploma on their IPE. While some are pursuing the high school diploma, which is code 1. So as of July 1 of 2020, PD 19-03 added an additional Data Element 400, which has the same expectation, but for those enrolled in a recognized equivalency program. So in other words, the GED. So same expectation. The GED or the other recognized equivalency program would also need to be a goal on the IPE in order for it to be documented as a credential. So hopefully, that helps clear that up a little bit.

And then Question number 8. So this is probably the most common question that we've gotten from folks. So I am just going to read it, but we've tried to outline the answer in a lot of detail so that you all have it. And Rimal did just thoroughly go over this in one of the previous questions, that you continue to report on a student with a disability until they no longer -- or as long as they meet the definition of a student with a disability. So Data Element 22 -- how do we use Data Element 22, a student with a disability? When do VR agencies report that an individual no longer meets the definition of a student with a disability? And can VR agencies simply stop reporting potentially eligible students with disabilities if they are not receiving pre-employment transition services? So reporting code 0 in Data Element 22 does not, quote, unquote exit the case because potentially eligible students with disabilities do not exit the VR program, like applicants, eligible individuals, and participants do. So remember in our previous training, we kind of talked about how the potentially eligible students are like a different subset of people that we're reporting on. So reporting in code 0 in Data Element 22 means that the individual is no longer potentially eligible for pre-employment transition services because he or she does not meet the definition of a student. If the VR agency reports code 1, which is they're a student with a disability because of an IEP, or code 2 because of a 504 plan, or code 3 because of other documentation that they're a student with a disability, for Data Element 22 in Quarter 1 -- but in Quarter 2, they no longer meet the definition of a student with a disability -- so maybe they dropped out of school, so they're no longer enrolled -- the agency would report code 0 for Data Element 22 in Quarter 2, and then the reporting for all data elements for that student stops in Quarter 3. So you do need to use Data Element 22 to not only show when they are a student with a disability, but you also need to tell RSA when they're no longer a student with a disability because that occurred in the quarter and then you stopped reporting on them. So after the agency has stopped reporting the data elements associated with that student, if the student later meets the definition of a student with a disability -- so they re-enroll in an education program -- and they start receiving Pre-ETS again, one of the five required activities, remember, then the VR agency is responsible for collecting and reporting all of the required potentially eligible data elements, including Data Element 22, in a new case. So that's kind of a scenario when pre-employment transition services may start and stop for a potentially eligible. But as long as they're enrolled, you would keep reporting those data elements. Even if they're not receiving services, like Rimal said, you would report all the potentially eligible data elements and leave all the services blank until they add a new service and -- but this kind of describes how you use Data Element 22 and when you stop reporting on them.

Another note that we just want you all to remember is that unique identifiers follow the individual. So opening a new case for a potentially eligible does not mean that you assign them a new unique identifier. So if the case is opened again because you had stopped reporting on them, make sure you're using the unique identifier because that needs to follow the student. Same thing with when you are a blind or a general agency, remember that unique identifiers follow the person. It's not just the agency. So I just wanted to throw out that reminder. Rimal, do you have anything else to add on this one?

**Rimal Desai:** Thank you, Rachel. I think you covered it well. I just wanted to, you know, remind as you said, unique identifiers must follow the individual. So we can in -- we can see in some scenarios the same year, you might have two cases for the same individual showing a disability, and that should be okay as long as there is documentation that follows the student that's not enrolled or -- you know, vice versa.

**Rachel Anderson:** Okay. Great. Thank you. Okay. That's all we have for today. So this was a quick one. Just a couple of points of clarification. Hopefully, that helped clarify things for many of you. We do have one more training coming out very shortly, and this one is simply going to describe all the RSA-911 data elements and information that's used in the WIOA Annual Report. So we are finding that some agencies aren't sure what information in their case management systems and the 911 feeds into that report. So we are going to outline all of that for you in our final training.

Resources for today, same ones as before. PD 16-04 for the current version, PD 19-03 for the new version coming out on July 1, and then the Crosswalk so that you can continue to educate yourself on the changes.

Here is our information. As always, please reach out to the data unit or your liaison at RSAData@ed.org or feel free to reach out to your WINTAC liaison. We do a lot of this in coordination to make sure we're answering questions the same. So thank you so much for reaching out to both of us. We really appreciate it. But reach out to wherever makes sense for you or whoever you need answers from. So Rimal, do you have anything else to add or are we good for today?

**Rimal Desai:** I just wanted to say thank you for joining us, and as Rachel mentioned, please let us know if you have any questions. More questions is better so we know that, you know, the agency has the right information and it's coming from RSA or WINTAC. Thank you.

**Rachel Anderson:** Thanks, everyone.