

Social Security Administration

Non-Attorney Representative Demonstration Project

Continuing Education Submission Form

The Social Security Protection Act (SSPA) section 303(b) (5) requires non-attorneys, who become eligible to participate in the demonstration project on direct payment of fees, to take continuing education classes that meet standards prescribed by the Social Security Administration (SSA). Participants in the project must take qualified, continuing education courses, including courses on ethics and professional conduct that are designed to enhance professional knowledge in matters related to entitlement to--or eligibility for--benefits based on disability under titles II and XVI of the Social Security Act (the Act).

Courses provided by an accredited college or university, a State bar association, an organization accredited by a State bar, a professional organization that (in whole or in part) specializes in representing claimants before governmental agencies (e.g., the American Bar Association, the National Organization of Social Security Claimants' Representatives, and the National Association of Disability Representatives, Inc.), or a governmental agency will meet the continuing education requirement. Generally, SSA will defer to the organization providing the course as to the subject matter, the requirements for receiving credit for an hour of instruction, and the qualifications of the instructor, although SSA reserves the right to reject specific courses or instructors if they determine that the course or the instructor is unacceptable.

In order to maintain eligibility for non-attorney fees, participants in the demonstration project are required to complete at least 12 hours of qualifying continuing education courses in the 18-month period beginning 6 months prior to the month in which the individual is notified that he or she has passed the examination, which tests participant knowledge about the Act and court decisions affecting benefit programs under titles II and XVI of the Act. After this initial 18-month period, the representative is required to complete 24 hours of instruction in each subsequent 2-year period. For example, if an individual is notified that he or she passed the examination in July 2005, the initial 18-month period begins January 1, 2005, and runs through June 30, 2006. The first 2-year period begins July 1, 2006, and the next begins July 1, 2008.

In each continuing education period, participants must take at least one hour of continuing education on ethics and professional conduct for representatives and at least one hour of continuing education regarding entitlement to--or eligibility for--benefits under titles II and XVI of the Act. Participants are otherwise free to determine the mix of course hours from these two categories.

If a participant is the instructor in an appropriate continuing education course he/she may receive 2 hours of credit per 1 course hour, up to a maximum of 6 hours. The 2 for 1 credit applies only with respect to a course hour during which the participant was an instructor. For example, if the participant was an instructor during 2 hours of a 3-hour course, and attends the remaining hour of the course, the participant would be credited with 5 continuing education hours.

Participants who fail to meet these continuing education requirements may be suspended from the demonstration project. To be reinstated, participants must first make up for any continuing education requirements which they failed to meet before they can begin to meet the continuing education requirements for the current period they are in.

Continuing education is credited on the day the course is completed, and is credited to the continuing education period in which the course completion date occurs, unless it is used to complete an unmet continuing education requirement from the prior period. Thus, for example, for a non-attorney representative who has 18-month and 24-month continuing education periods as described above, all of the hours in an 8-hour class that begins on June 30, 2006, and ends on July 1, 2006, would be credited to the 24-month period beginning July 1, 2006, unless one or more of those hours is used to complete an unmet continuing education requirement for the period ending June 30, 2006. Hours earned in one continuing education period may be used to satisfy an unmet requirement for the prior period only for the purpose of ending a suspension that has gone into effect, not to prevent the occurrence of a suspension. Any continuing education hours allocated to a prior continuing education period in this manner may not also be counted toward the continuing education requirement in the current period. Thus, for example, if 1 hour of an 8-hour course completed in the current period is used to satisfy an unmet continuing education requirement for the prior period, only 7 of the 8 education hours from the course would be credited toward satisfaction of the continuing education requirement for the current period.

[Participants may update their continuing education credits and can notify us of completed courses by using this form or updating that information on our website at \[www.cps.ca.gov/tlc/ssa/signin.asp\]\(http://www.cps.ca.gov/tlc/ssa/signin.asp\). In the first year of eligibility, participants will need to submit their completed continuing education information within 12 months of their eligibility determination. During the remaining 4 years of the demonstration project, participants will need to submit their completed continuing education information every 2 years by the anniversary date of their eligibility determination.](http://www.cps.ca.gov/tlc/ssa/signin.asp)

Continuing Education – Course Information

SUPPLEMENTAL

1 For which Continuing Education (CE) period is this course? The credit hours being reported are for the current CE period. The credit hours being reported are for a prior CE period.

Course Title:

Number of Hours:

Course Description:

Were you the instructor for this course?

Yes No

Did you receive a certificate?

Yes No

Please Indicate the Course Category:

- Ethics/Professional Conduct
- Entitlement to, or eligibility for, benefits under titles II and XVI of the Act
- Other course related to entitlement to, or eligibility for, benefits based on disability under titles II and XVI of the Social Security Act (the Act)

Please indicate the type of organization providing the course:

- Accredited College/University
- State Bar Association
- Organization Accredited by a State Bar
- Professional Organization that (in whole or in part) specializes in representing claimants before governmental agencies
- Governmental Agency

Name of College or Institution:

Name of Instructor or Contact Person:

Phone:

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2 For which Continuing Education (CE) period is this course? The credit hours being reported are for the current CE period. The credit hours being reported are for a prior CE period.

Course Title:

Number of Hours:

Course Description:

Were you the instructor for this course?

Yes No

Did you receive a certificate?

Yes No

Please Indicate the Course Category:

- Ethics/Professional Conduct
- Entitlement to, or eligibility for, benefits under titles II and XVI of the Act
- Other course related to entitlement to, or eligibility for, benefits based on disability under titles II and XVI of the Social Security Act (the Act)

Please indicate the type of organization providing the course:

- Accredited College/University
- State Bar Association
- Organization Accredited by a State Bar
- Professional Organization that (in whole or in part) specializes in representing claimants before governmental agencies
- Governmental Agency

Name of College or Institution:

Name of Instructor or Contact Person:

Phone:

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Please submit completed forms to:
CPS Human Resources Services

241 Lathrop Way, Suite A
Sacramento, CA 95815
Fax: (916) 561-8433

- Privacy Act Statement

The information requested on this form is authorized by section 303 of the Social Security Protection Act of 2004 (Public Law 108-203). The information provided will be used to further document your application for participation in the demonstration project authorized by section 303 and permit a determination about your eligibility to receive direct payment of fees (from a claimant's past-due benefits) for your representation services. Information requested on this form is voluntary. However, if you do not provide the required information, a decision based on the evidence in your application file can result in a determination that you are ineligible for direct payment of fees. While the information you furnish on this form would almost never be used for any purpose other than making a determination about your eligibility for direct payment of fees, such information may be disclosed by the Social Security Administration (SSA) for the following purposes (1) to assist SSA in determining your eligibility for direct payment of fees; (2) to facilitate statistical research and audit activities necessary to assure the integrity and improvement of the demonstration project administered by SSA, and (3) to comply with laws and regulations requiring the exchange of information between SSA and another agency.

- Paperwork Reduction Act Statement

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 30 minutes to read the instructions, gather the facts, and answer the questions. **SEND THE COMPLETED FORM TO THE PRIVATE CONTRACTOR LISTED ABOVE.** *You may send comments on our time estimate above to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401. **Send only comments relating to our time estimate to this address, not the completed form.***