

# Social Security Benefits – A Unified Process Involving SSA Specialists

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## Job Duties:

SSA Specialists are liaisons between Children’s Division (CD) and the Social Security Administration (SSA). The Social Security Specialists perform the following duties:

- Apply for disability (SSI) and survivors, also known as death (OASI) benefits for youth in alternative care;
- Provide and communicate correspondence, forms, etc. from the SSA to CD workers; and
- Apply to be the representative payee on behalf of CD for a youth’s benefits while in alternative care.

Not all needs are fulfilled by the SSA Specialists. The following functions are not completed by SSA Specialists:

- Obtain a replacement Social Security card;
- Apply for a new Social Security Number;
- Apply to be representative payee on behalf of a parent, placement provider, legal guardian, or adoptive family

## Benefit Types

### SSI (Supplemental Security Income)

- Established on a youth's disability
  - Qualifying conditions are listed in the Child Welfare Manual <http://dss.mo.gov/cd/info/cwmanual/section4/ch11/sec4ch11attachg.htm>
- Income-based program
  - A youth's employment can affect benefit amounts, therefore wages must be reported to your regional SSA Specialist on a monthly basis

### OASI (Old age, Survivors, and Disability Insurance)

- Established on a parent's Social Security record
- An application will need to be made if one or both parents are disabled or deceased

## Social Security Referral Process

CD caseworkers or IV-E Analysts can refer a child for a new application for benefits. The referral can be emailed to your regional SSA Specialist and will need to include the child's name and DCN. The SSA Specialist needs this information in order to verify the youth is not currently in receipt of benefits.

For a new SSI/Disability application, your SSA Specialist will send you the necessary forms to be complete with instructions to begin the new claim process.

For a new OASI/Survivor's application, you must provide the name, SSN, and date of birth for the parent of the child filing the claim. If the parent is deceased, you must also provide a date of death, the city and state where the parent died, and whether or not the parent was married at the time of death.

In addition, SSA Specialists may discover youth that could be potentially eligible for benefits based off reports and information in FACES. Therefore, information may be requested and the CD worker's cooperation would be necessary to begin an application for benefits at that time.

## Completing a New SSI Application

Upon receipt of forms for a new disability application, the following guidelines must be noted:

- Each form must be filled out as completely as possible
  - A placement provider or parent can assist if needed
- The forms should be returned to your SSA Specialist via email in a timely manner
- Contact information for doctors, hospitals, therapists, and schools is necessary in order for SSA to initiate a records request
- A court order establishing custody is to be included when the forms are returned

## Providers as Payee

The Child Welfare Manual states “The Division Director should always be made the payee for open alternative care cases in which CD has custody. In some rare instances, Social Security Administration (SSA) may select someone else to be representative payee”. These rare instances will be decided on a case by case basis by the SSA, case workers or CD workers, and SSA Specialists. If a child is placed in a licensed foster home or licensed relative home, the placement provider is not eligible to serve as representative payee, and therefore will not be considered. In some circumstances, a youth may serve as his or her own representative payee.

Because CD is the representative payee for most youth in care, it is important that the SSA Specialists receive all correspondence with regards to the youth’s Social Security benefits to effectively manage and monitor benefit status. If your office has received any correspondence directly from the Social Security Administration, please forward it the following address:

Division of Finance and Administrative Services (DFAS)  
ATTN: Child Welfare Unit/SSA Specialist  
PO BOX 1082  
Jefferson City, MO 65102

## Appointment Notifications

Disability Determinations, an office which works jointly with the Social Security Administration to determine and process outcomes for new disability applications and CDRs, will schedule exams to assist with medical eligibility determinations. Your SSA Specialist will notify and forward the appointment notice as well as send reminders for upcoming appointments. It is imperative to follow the instructions outlined in the notification to either confirm or reschedule the appointment, if necessary.

- Examples of examinations:
  - Physical exam
  - Psychological exam
  - Speech and hearing assessments
  - Vision testing

\*NOTE: The SSA must be provided with a reasonable explanation when an appointment needs to be rescheduled.

\*NOTE: If the appointment is confirmed, it is vital that the youth appears at the appointment as there are consequences for missed appointments. These consequences may lead to suspension or discontinuation of benefits for the youth.

## Continuing Benefits

Continuing Disability Reviews (CDRs) are sent every 3-5 years to determine if a child is still considered disabled under Social Security's definitions to continue receiving SSI benefits. This packet of forms will be forwarded to you by your regional SSA Specialist via mail. The same guidelines for new applications apply; however, please note a CDR must be returned using the envelope included within the packet within 30 days of the date on the letter to avoid suspension of benefits.

An advance notice of termination is sent for youth in receipt of OASI benefits to determine eligibility beyond age 18. A child may be eligible for benefits after age 18 as a disabled adult child, or if he or she is still enrolled in high school on their 19<sup>th</sup> birthday. This form is forwarded by your regional SSA Specialist via mail 6 months prior to a youth's 18<sup>th</sup> birthday. It is important to complete and return this form accurately and in a timely manner in order to avoid loss of benefits. In the event the youth is eligible to continue receiving benefits while in school, the youth will become his or her own representative payee upon their 18<sup>th</sup> birthday.

## Older Youth and SSI

When a youth is in receipt of SSI and reaches age 18, a CDR is sent by SSA to determine if he or she may be eligible for SSI under the adult criteria. The CDR must be returned using the envelope included in the packet to the SSA within 30 days of the date on the letter to avoid suspension of benefits. Should the young adult be considered disabled under adult criteria, a determination will need to be done to see if they would be able to serve as their own payee. If the young adult is incapable of handling his or her own finances, CD can remain as representative payee with documentation showing the young adult needs a conservator. If the young adult is deemed capable of handling his or her own finances, then the representative payee will be changed to the young adult's name.

## KIDS Accounts

KIDS accounts are utilized for managing benefits for youth in care. Only youth that receive SSI and OASI benefit payments will have a KIDS account. These funds are deposited into the accounts and are used to pay for the youth's needs (shelter, clothing, etc.) In addition, a KIDS account is utilized as a savings mechanism for youth over age 16 ½, so that they may have financial resources available when they exit care.

The maximum resource limit set by the SSA is \$2000.00. When a youth's KIDS account reaches \$1400.00, spend notification letters will be sent out by Heather Evers. In the event you receive a spend letter, action must be taken within five business days to reduce the youth's account balance. The spend letter is very detailed and provides explicit instructions for how to complete purchases for the youth. Please be sure to contact Heather at 573-751-8944 with any questions as these transactions are time sensitive. If the account balance is not reduced in a timely manner, any funds exceeding the resource limit will have to be returned to the SSA. If there are multiple months when a youth's

benefits have to be returned as a result of exceeding the resource limit, the youth's benefits will be suspended.

It may be beneficial to work with the placement provider to create a wish list or gift registry from an approved vendor. Keep in mind there are some limitations on purchases.

Examples of approved items for purchase include but are not limited to:

- Clothing
- School supplies
- Electronics
- Tutorial services
- Furniture and bedding
- Household items
- Extracurricular activities (Karate, gymnastics, sports camps, etc.)
- Other school costs (class ring, etc.)
- Funeral expenses, including a pre-paid burial plan

Examples of purchases that are not allowed include:

- Swimming pool
- Trampoline
- Motorcycle or four wheeler
- Pets
- Gift cards
- Anything that cannot travel with the child

## **Dedicated KIDS Accounts**

A dedicated KIDS account is utilized for youth who receive large back payments. It is an SSA requirement that a separate bank account be set up for these large payments. These accounts do not have balance limits; however they do have limited purchasing options.

Examples of allowable purchases include:

- Medical treatment
- Education expenses
- Job skills training
- Equipment, therapy, or rehabilitation related to the child's impairment
- Funeral expenses, including a pre-paid burial plan

Examples of items not allowed for purchase out of the Dedicated KIDS account include:

- Food
- Clothing
- Personal items not related to the child's impairment
- Most items allowed with a regular KIDS account purchase

## Information Needed from CD Caseworkers

In order to effectively and successfully manage benefits for youth receiving SSI or OASI, it is essential for CD caseworkers to work collaboratively with SSA Specialists. The SSA frequently requires information and/or updates with regards to youth in CD custody to ensure benefits are being paid accurately and appropriately. Required information includes:

- Court documents
- Proof of income if a youth is working
- Changes in legal status
- Placement changes
  - Especially THV, MMH, or RUN

Due to the numerous factors affecting SSI benefits, it is imperative FACES screens are updated accurately and promptly. SSA Specialists rely heavily on information in a youth's Alternative Care screens, such as placements (including temporary placement screens) and maintenance payments.

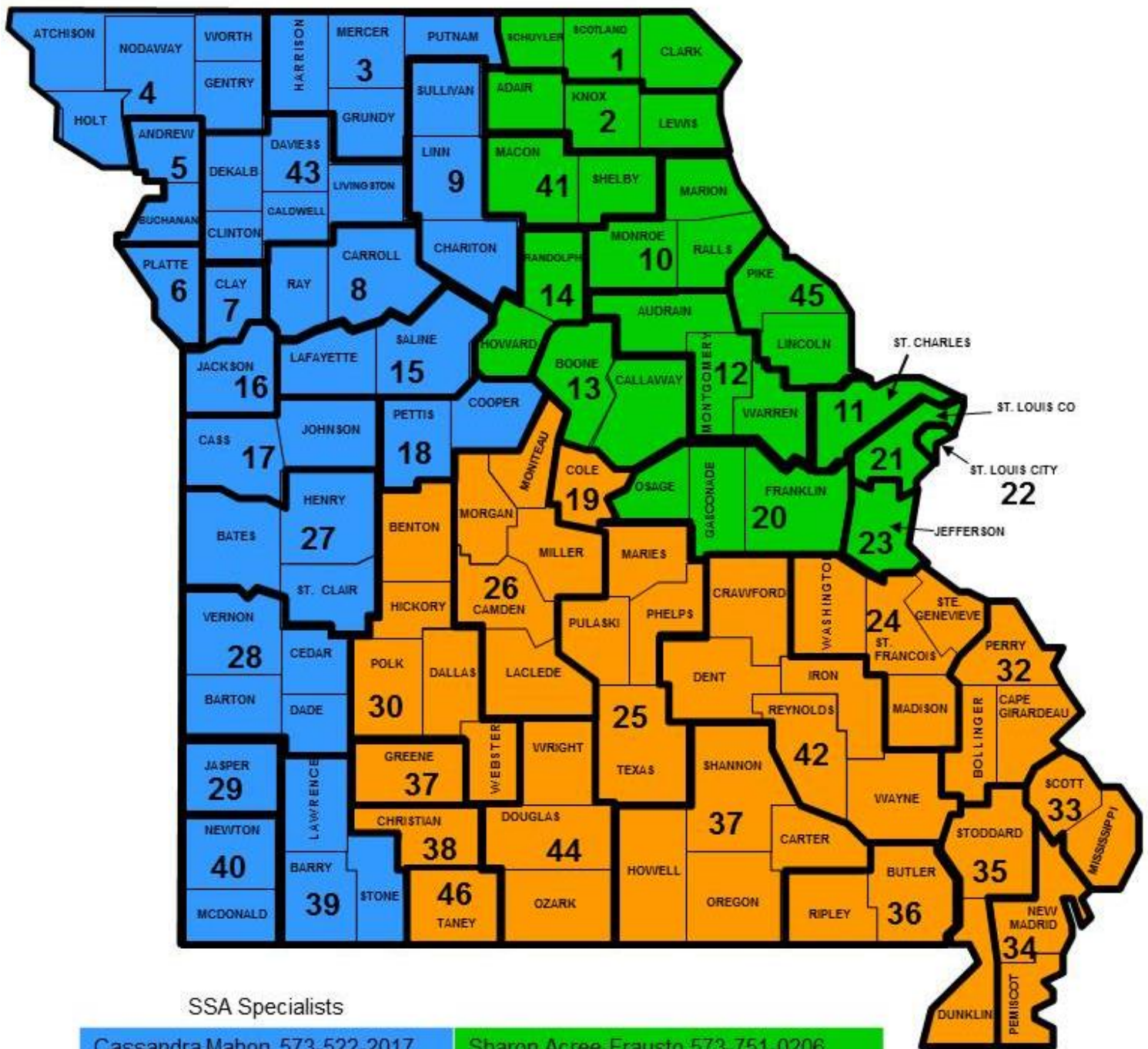
In addition, there cannot be enough emphasis on the importance of completing and returning forms timely. All forms requested by SSA are time sensitive and should be returned within 30 days of the date on the letter. Proof of income must be provided monthly in the form of check stubs or payroll statements from the employer in the event a youth is working and receiving SSI.

## For Questions

If you have any questions, or need additional information, please do not hesitate to contact your regional SSA Specialist. The map on the next page displays the regional split designated by color and SSA Specialist.

# SSA/SSI Specialists

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## SSA Specialists

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