Kids Central, Inc. System of Care
Policy & Procedure

Series:	**Master Trust Accounts**		
Policy Name:	**Social Security Applications**		
Policy Number:	**1218**		
Origination Date:	**07/01/10**	**Revision Date:**	
Authority:	**402 F.S., 737 F.S., 39 F.S., 415 F.S., 65C-17 F.A.C.**		
Attachments:	Sample Form SSA-11 Authorization to Disclose Form SSA/SSI Application Tracking Log Template Notarized Designation of Client Money and Property (CF-FSP 5222)		

Purpose

The purpose of this policy is to collect, review, and submit initial client Social Security applications, Authorization to Disclose form, Notarized Designation of Client Money and Property form, Representative Payee requests, and re-determinations.

Policy

It is the policy of the organization to properly complete, submit, and track client applications for Social Security benefits.

Procedure

A. Master Trust Client Representative collects the initial Social Security applications, Authorization to Disclose form, Notarized Designation of Client Money and Property form, requests to be selected as Representative Payee, and re-determinations, and performs the following actions:

1. **If the document is an application for Social Security Act Title II or for Supplemental Security Income Benefits:**
   - Family Care Manager completes the Social Security application and the "Authorization to Disclose Information" Form. The application packet is forward to the Master Trust Client Representative.
   - Master Trust Client Representative reviews the application for completeness. The application packets must include copies of court orders related to the child's most current removal and placement into the Department's custody. Social Security Administration will not accept court orders for prior episodes.
   - If the application is for SSI, medical records should be submitted to the Master Trust Client Representative who will complete the medical records on-line prior to the phone interview.

- Master Trust Client Representative logs the application onto the SSA/SSI Tracking Log[1].
- Master Trust Client Representative forwards the application packet to the Revenue Maximization Supervisor/ Director of Accounting and Revenue Maximization for approval.
- Once approved, the application packet is returned to the Master Trust Client Representative who forwards the packet directly to Social Security Administration.
- Master Trust Client Representative creates a Master Trust File[2] to maintain the client's records.
- Master Trust Client Representative should place a copy of the application packet in the client's Master Trust File.

2. If the document is a Request to be Selected as Representative Payee (Form SSA-11):

- Master Trust Client Representative completes form SSA-11 to request that KCI is selected to become the representative payee. The date the request is made is logged onto the SSA/SSI application tracking log.
- If the client does not have a Master Trust File already established, the Master Trust Client Representative creates a Master Trust File to maintain the client's records.
- Master Trust Client Representative should place a copy of form SSA-11 in the client's Master Trust File; and forwards the original form SSA-11 to the Revenue Maximization Supervisor/Director of Accounting and Revenue Maximization for approval.
- Once approved, form SSA-11 is returned along with the shelter order to the Master Trust Client Representative who forwards the document directly to Social Security Administration.

3. If the document is a Notarized Designation of Client Money and Property (Form CF – FSP 5222):

- Family Care Managers are responsible to submit this document to the KCI Master Trust Client Representative when a client wants to either apply for benefits or redirect benefits. (In the absence of the Master Trust Client Representative the form will be forward to the Revenue Maximization Supervisor).
- Family Care Managers are responsible to complete this form, sign it, and have their signature notarized.
- The Master Trust Client Representative places the original Notarized Designation of Client Money and Property (Form CF – FSP 5222) in the client's file and sends a copy to Children's Legal Services.

[1] SSA/SSI Tracking Log is a spreadsheet maintained by the Master Trust Client Representative to monitor the intake and progress of SSA/SSI applications. This spreadsheet should maintain the client's demographic and claim information, as well as application received and sent dates, and dates of communications with Social Security Administration.

[2] Master Trust File will be an internal file that KCI will maintain to hold the clients' documents related to benefit payments and master trust account activity.

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4. **If the document is a Re-Determination**:
   - Master Trust Client Representative will coordinate with the Family Care Manager to complete re-determination requests received from the Social Security Administration.
   - All completed, required forms will be copied for the Master Trust file and forward to the Revenue maximization Supervisor/Director of Accounting and Revenue Maximization for approval.
   - Once approved, the re-determination documents should be returned to the Master Trust Client Representative who forwards the documents directly to Social Security Administration.

Approved By:

Cynthia A. Schuler, Chief Executive Officer   Date