



## Department of Transitional Assistance & University of Massachusetts Medical School

### Social Security Projects



DEPARTMENT OF TRANSITIONAL ASSISTANCE



## Social Security Projects

### Agenda

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- Introductions and Background
- Resource Team
- Social Security iPro
- Social Security Appeals

# Social Security Projects

## Introductions

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- Nancy King/Nancy Dwyer
  - DTA
- Frank Joyce
  - UMMS: Disability Evaluation Services
- Phil Barrell
  - UMMS: Disability Evaluation Services
- Dayce Moore
  - UMMS: Center For Health Care Financing

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# Social Security Projects

## Background

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- DTA is interested in maximizing access to eligible benefits for their clients
- Study found low SSI approval rate for DTA recipients reviewed and approved for disability by DES
  - Overall only 33% of recipients approved by DES were also approved by SSA for SSI benefits
  - The SSI application and appeal process can be confusing for clients, DTA wanted to provide assistance

*Remedy:* Harness the expertise of UMMS to maximize SSI approval.

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## Resource Team

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### The Resource Team

- A DES Disability Specialist and Disability Coordinator, and ICI Vocational Counselor work in the Springfield/Liberty Street and Worcester TAOs
- The Disability Coordinators are bilingual (Spanish/English)
- This pilot started in July, 2006

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# Social Security Projects

## Resource Team

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### Resource Team Activities

- Helping DTA clients with completing disability supplement
- Follow up to assist with process
- Disability approvals
- Prescreening of LD referrals
- Vocational services (ICI)
- Assisting with completion of Social Security online application (2/07)

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# Social Security Projects

## Resource Team

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### Aggregate Data 7/06 – 3/07 Springfield/Liberty and Worcester:

- 2029 DTA clients seen by Resource Team staff
- 323 disability approvals at TAO
- 410 referrals to ICI Voc

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## Social Security iPro

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- **To Date:**
  - Mailed 42 introduction letters to recipients
  - 17 recipients pending contact
  - 3 recipients unable to contact
  - 22 recipients contacted

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## Social Security iPro

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- **Of those contacted:**
  - 17 Recipients accepted help
  - 5 Recipients refused help w/SSA

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# Social Security Projects

## Social Security iPro

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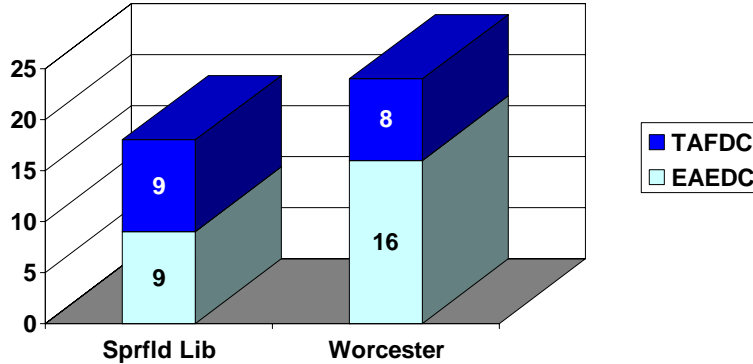
- **Of those that accepted help:**
  - 5 recipients pending online application
  - 3 recipients became ineligible at online appl.
  - 3 recipient pending SSA Phone interview
  - 4 recipients pending SSA decision
  - 2 recipients did not keep their iPro appointment

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## Social Security iPro

The following chart shows eligible referrals by program type:



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## Social Security iPro

**Processing** – DES copying, reviewing files or waiting for additional treating source information.

**Initial Letter** - All recipients have an letter of introduction sent to them.

**Call 1** - If there is no response from the initial letter, a follow up call is made 5 days from the first mailing.

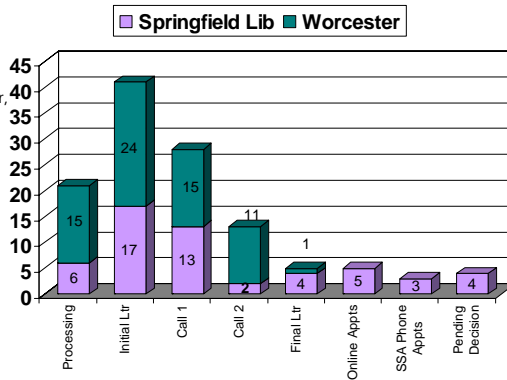
**Call 2** – If unable to contact with call 1, a second call is made 10 days from the initial letter.

**Final Letter** – If unable to contact on the second call, a final letter is sent offering the service to the recipient.

**Online appts** – Details how many recipients have an on line appointment pending.

**SSA Phone Appts** - Details how many recipients have pending phone interviews with SSA.

**Pending Decision** – Details how many recipients have completed the process and are awaiting an SSI decision.

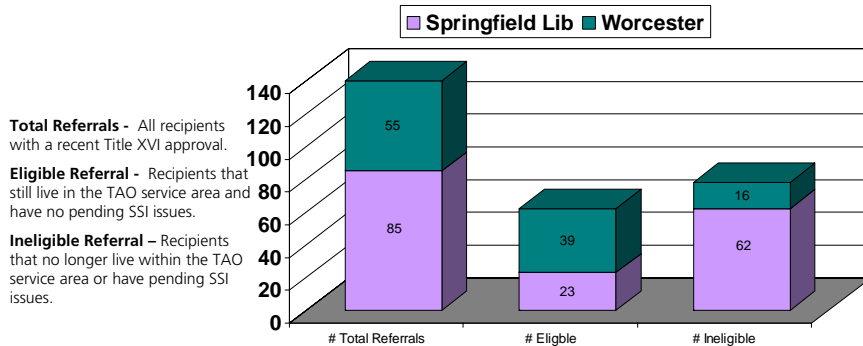


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## Social Security iPro

This chart shows recipients that were eligible vs. ineligible for the iPro 3368 program.



**Total Referrals** - All recipients with a recent Title XVI approval.

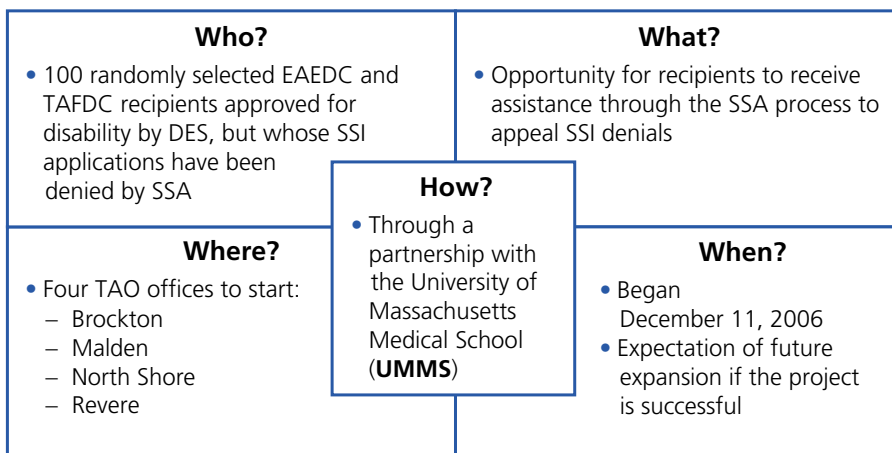
**Eligible Referral** - Recipients that still live in the TAO service area and have no pending SSI issues.

**Ineligible Referral** - Recipients that no longer live within the TAO service area or have pending SSI issues.

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# Social Security Projects

## Social Security Appeals



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# Social Security Projects

## Social Security Appeals

### Why?

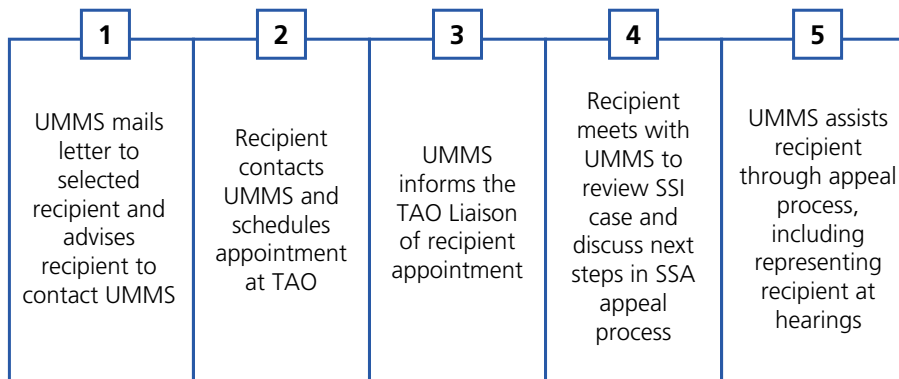
- DTA and UMMS want to help eligible recipients become approved for SSI benefits
- SSA appeal process is complicated and difficult for recipients to navigate
- With SSI, recipients will receive more money

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# Social Security Projects

## Social Security Appeals

### Basic Project Process



→ UMMS continually updates TAO Liaison of appeal status through weekly log →

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## Social Security Appeals

### TAO Liaison

- Give copies of appointment lists to TAO reception area staff
- Give copies of letters sent to recipients to appropriate AU Managers

• **Encourage recipients to file SSI appeals immediately and contact UMMS for assistance**

- Inform TAO Liaison if a selected recipient's case closes

### AU Manager

### UMMS Representative

- Send TAO Liaison copies of all letters sent to recipients
- Contact TAO Liaison when letters mailed to recipients are returned
- Fax or e-mail TAO Liaison appointment information
- Arrange for translation services, when necessary, through DTA's Central Office
- Fax the weekly update log to the TAO Liaison
- Assist recipients through all aspects of the SSA appeal process

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# Social Security Projects

## Social Security Appeals

- **To Date:**
  - Mailed 65 Letters of Introduction
  - Contacted by 35 Clients
  - Scheduled 31 Meetings
  - Received 27 Signed Authorized Representative Forms
  - Requested 19 Appeals
  - Closed 12 Cases Without Filing Appeals

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