

Checklist off Items to take when going to SSA/Medicaid for application

- 1. Determine the type of social security client needs, SSI or SSDI.
Application the same. When you apply for SSI, they will process an application for SSDI. Client will get a denial letter for that if client did not work.**
- 2. Down load SSA Adult Kit or Child kit and send to family to start filling out. Meet with family to complete the application once all documents are obtained.**
- 3. In preparing for SSA appointment, obtain the following documents:**
 - 1. medical records that document every diagnosis the client has. Recent records with a good H&P that documents onset dates, etc.**
 - 2. IEP from school, psychology evaluations that document developmental delays.**
 - 3. Social Security Card**
 - 4. Photo ID**
 - 5. Birth Certificate**
 - 6. Copy of Special Needs Trust Document (cover letter from attorney if possible)**
 - 7. Copy of bank statements, income verification, W2's , Trust quarterly statement**
 - 8. Life insurance policies**
 - 9. Health care cards, ie, Medicaid, Kaiser etc.**
- 4. Once all documents are obtained, meet with family to complete the SSA application.**
- 5. Call the local SSA office to make an appointment for the SSA application. Go to the website to input client's zip code to find the local office.**

- 6. Take client and family to SSA office for the appointment if possible. be prepared for a wait. Weed out the most important medical records. Don't take a huge stack. Take all documents and let the case worker know you have the application completed. Give brief description of SNT, ie, "it is a trust written to allow government benefits and it is not counted as an asset".**
- 7. Tell client/family to call you when they receive anything in writing from SSA. If you get a denial you have 30-60 days to appeal. Complete the appeal form and take it to the SSA office. Always ask for a formal meeting for your appeal.**
- 8. Approval within 45-90 days of application. Then close case.**
- 9. If you get a denial, child can apply for Peachcare or Katie Beckett. Child must be without insurance for 6 months to get Peachcare and there is a monthly premium. Katie Beckett requires child to be significantly impaired, in need of 3 therapies and 5 or 6 forms completed and signed by physician. Family can apply for Peachcare on line. Katie Beckett must apply at the local DFACS. Applications/forms on-line.**
- 10. For Adults who have SSDI and their income is too high for regular Medicaid, can apply for the CCSP Waiver program and Medicaid or Medicaid QMB if the SSDI is below 978.00. Requires same information/documents as SSA – list above. Client must be in need of home care assistance. Call the vendor for CCSP. The provider will come out to do a nursing assessment and social worker will do the Medicaid application. Vendor will determine how many hours of home care are approved (and paid by Medicaid). Vendor will submit application to the local DFACS for Medicaid approval. There is a cost share per month fee for this determined by the amount of SSDI client gets, could be \$200-\$500 or more.**
- 11. Medicaid Spend down-this is a kind of Medicaid that requires monthly approval for services.**