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Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
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Secretary

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Commissioner

November 17, 2006

To: Transitional Assistance Office Staff
From:  Cescia Derderian, Assistant Commissioner for Field Operations
Re: New Initiative: EAEDC and TAFDC: Social Security Appeals Project

Background DTA and the University of Massachusetts Medical School (UMMS) have designed a program to assist certain EAEDC and TAFDC recipients appeal the denial of their application for Supplemental Security Income (SSI). This new initiative, called the Social Security Appeals Project, will be implemented December 11, 2006 and will be offered in five TAOs: **Brockton, Former Davis Square, Malden, North Shore, and Revere.**

Because the application process for Social Security Administration (SSA) benefits can be confusing and overwhelming, many DTA recipients who might otherwise have been approved are denied. The Social Security Appeals Project will work with recipients to help them overcome these difficulties.

Project Objectives

UMMS will provide services to randomly selected EAEDC and TAFDC recipients to help the recipients through the appeal process. UMMS will review their Social Security files and represent these recipients at the SSA appeal hearings. The services provided by UMMS are expected to result in more recipients receiving favorable disability appeal decisions and Social Security benefits. Accepting the UMMS services is voluntary on the part of the recipient.

Central Office will monitor and evaluate the Social Security Appeals Project, with the expectation of expanding the UMMS services statewide if the project is successful.

**Program
Implementation**

The Social Security Appeals Project will serve approximately 100 EAEDC or TAFDC recipients randomly selected for this initiative from the five TAOs mentioned earlier in this memo. Each of the TAOs will designate a liaison for this project. UMMS will assign a representative to work with each of the TAOs.

UMMS will mail the EAEDC or TAFDC recipient a letter on DTA letterhead, in English and Spanish, with a Multilingual Card inserted in the envelope. The letter (Attachment A for EAEDC; Attachment B for TAFDC) will encourage the selected recipients to take advantage of the services offered by UMMS to help them with their appeal.

Note: Only recipients who receive this letter are eligible to participate in this initiative.

Specifically, the letters:

- Explain the services offered by UMMS and how the services will benefit the recipients;
- Provide the toll-free number for recipients to call UMMS to volunteer to participate: **1-800-890-2986** and ask for the **Social Security Appeals Unit**;
- Advise recipients that they have **10 days from the date of the letter to contact UMMS** to schedule an appointment;
- Inform recipients that meetings with a UMMS representative will take place at the recipient's TAO, whenever possible; and
- Advise recipients that this is a voluntary and free service.

REMINDER:

EAEDC recipients are **required** to appeal their SSI denial in order to remain eligible for EAEDC.

TAFDC recipients have the option of appealing the SSI denials. However, they should be encouraged to appeal by advising them of the increase in monthly household income for the family with receipt of SSI benefits.

**UMMS
Representative
Responsibilities**

The UMMS representative assigned to a TAO will have a specific day scheduled with the TAO when he or she will meet recipients who have agreed to participate in the project. The UMMS representative will communicate to the TAOs through the TAO Liaison.

Each week, UMMS representatives will:

- Send the appropriate TAO Liaison copies of the letters sent to recipients;
- Fax the TAO Liaison, a log containing the names of the recipients and their status in the project. The log is specific to each TAO. UMMS will use this log to inform DTA who is participating in the Social Security Appeals Project or who declined the help, either directly, or by failing to contact UMMS;
- Provide updates on each project participant's appeal. The log will be cumulative, as recipients who are sent letters are added weekly; and
- Contact the TAO Liaison when letters sent to recipients are returned.

When the selected EAEDC and TAFDC recipients contact UMMS and schedule an appointment, UMMS representatives will:

- Arrange for translation services or an American Sign Language (ASL) interpreter, when needed, by contacting the DTA Central Office;
 - Fax or e-mail to the appropriate TAO Liaison a list of names and appointment dates and times, at least one day before the first scheduled appointment; and
 - Include on the scheduled appointments list the name and telephone number of any translator or person providing ASL services.
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**TAO Liaison and
AU Manager
Responsibilities**

Upon receipt of the appointment list and copies of the letters, the TAO Liaison will: give a copy of the appointment list to TAO reception area staff; and give the letters to the appropriate AU Manager to review and file in the AU case record.

AU Managers must inform the TAO Liaison when or if a selected recipient's AU is closed. In this instance, or if there are other circumstances that may affect a recipient's participation in the Social Security Appeals Project, the TAO Liaison will notify the UMMS representative.

If after receiving the DTA/UMMS letter, a selected recipient contacts the TAO with questions concerning the project, AU Managers must:

- Advise the recipient to file the SSI appeal right away, if he or she has not done so;
- Access the Disability window in BEACON; verify the recipient's appeal status in the SSI Tracking tab; and
- Encourage the recipient to contact UMASS within 10 days from the date of the letter at **1-800-890-2986** and ask for the **Social Security Appeals Unit** to get help with the appeal. If a recipient contacts the AU Manager more than 10 days from the date of the letter, the recipient should still be encouraged to contact UMMS directly.

**Introduction of
the Project to
TAO Staff**

DTA and UMMS plan to have a kickoff event for the Social Security Appeals Project at each of the five TAOs. At these meetings, UMMS will introduce the project's representatives, and make a presentation to TAO staff concerning the goals of the program. DTA staff and UMMS representatives will have the opportunity to discuss the procedures outlined in this memo.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at 617-348-8478.

Attachment A

DTA Letterhead

DATE

Dear John Smith,

Your application for SSI benefits was recently denied. We sent you a letter telling you that you must appeal the denial of your SSI application. There is help available to assist you with the appeal process. This assistance is only offered in certain areas and is only available to people who receive this letter.

The people who can help with your appeal are from the University of Massachusetts Medical School (UMMS) and they have experience with the SSI appeal process. The information below explains what you must do if you would like UMMS to help with your SSI appeal.

What will UMMS do?

- Meet with you at your DTA office
- Explain everything that will happen in the appeal process
- Represent you in meetings and hearings with Social Security

What do you have to do?

- Call UMMS at 1-800-890-2986 and ask for the Social Security Appeals Unit within ten days of the date on this letter to schedule an appointment
- Come to that appointment and meet with them to review your case
- Sign a form which will tell Social Security UMMS is working for you
- Agree to let UMMS review your medical records

What will it cost you?

- Nothing, help from UMMS is free

Taking help from UMMS is voluntary. You may file an SSI appeal on your own or you may take advantage of their help. Remember, to keep receiving EAEDC, you must appeal your SSI denial. This is your responsibility.

Please call 1-800-890-2986 and ask for the Social Security Appeals Unit within ten days if you would like UMMS to help with your SSI appeal. They can help even if you have already filed your appeal.

We know that appealing your SSI denial can be complicated, but you need to do it. UMMS has experience working with SSI and the Social Security Administration and they want to help you. Please call them.

Attachment B

DTA Letterhead

DATE

Dear John Smith,

We have received notice that your application for SSI benefits was recently denied. There are important reasons to appeal your SSI denial. You may appeal this denial and Social Security will look at your case again. If you win your appeal and receive SSI, you and your family will get more money than you do on TAFDC. There is help available to you with the appeal process. This assistance is only offered in certain areas and is only available to people who receive this letter.

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Please call 1-800-890-2986 and ask for the Social Security Appeals Unit within ten days if you would like UMMS to help with your SSI appeal. They can help even if you have already filed your appeal.

We know that appealing your SSI denial can be complicated, but you should do it. UMMS has experience working with SSI and the Social Security Administration and they want to help you. Please call them.

