

# CONSUMER BENEFITS TRAINING MANUAL

## Table of Contents

### Section A: Introduction to CBO

1. CBO Intro Power Point - 8:15 Day 1
  - a. CBO...The Beginning
  - b. Housekeeping
  - c. CBO Officers
  - d. Training Dates
  - e. Bylaws
  - f. Performance Contract
    - i. DSHS Information H
    - ii. DADS Attachment L
2. CBO Newbie Objectives - Power Point - 3:15 Day 1
  - a. CBO Web Resources
  - b. SSI/SSDI Flow Chart
  - c. Helpful Links

### Section B: Preparing for...

1. Before applying for Social Security Benefits
2. SGA - Substantial Gain Activity
3. Medical and Job Worksheet - Adult - SSA 3381
4. Medical and School Worksheet - Child - SSA 3819
5. HHSC - Household Expense Worksheet

### Section C: Adult Forms

1. Checklist for Adult Disability Application Forms
2. SSA-1696-U4 Claimants Appointment of Representative
3. SSA-827 Authorization to Disclose Information to SSA
4. SSA-8000-BK Application for Supplemental Security Income (SSI)
5. SSA-8001-BK Application for SSI - revised
6. SSA 16-BK SSDI Application
7. Applying for Social Security Disability Online

8. SSA-3368-BK Disability Report - Adult
9. Applying online for Social Security Disability SSA-3369-BK Work History Report
10. Function Report SSA 3373 informational Sheet
11. SSA-3373-BK Function Report Adult
12. SSA-3380-BK - Function Report Adult - Third Party
13. 1199A - Direct Deposit Sign Up Form
14. SSA-795 Statement of Claimant or Other Person
15. SSA-3288 Consent for Release of Information

#### Section D: Child Forms

1. Checklist for Child Disability Applications Forms
2. SSA-1696-U4 Claimant's Appointment of Representative
3. SSA-8000-BK Application for SSI - Both adult and Child
4. SSA-8001-BK Application for SSI - revised
5. SSA-3820-BK Disability Report - Child
6. SSA-3881-BK Questionnaire for Children Claiming SSI Benefits
7. SSA-3371-BK Pain Report - Child
8. SSA-3375-BK Function Report - birth to 1 yr
9. SSA-3376-BK Function Report - 1 to 3<sup>rd</sup>
10. SSA-3377-BK Function Report - 3 to 6<sup>th</sup>
11. SSA-3378-BK Function Report - 6 to 12<sup>th</sup>
12. SSA-3379-BK Function Report - 12 to 18<sup>th</sup>
13. SSA-827 Authorization to Disclose Information to SSA

#### Section E: Appeals and ALJ

1. Appeals Process Forms Checklist
2. The 5 Step Sequential Process
3. Hearing Questionnaire
4. SSA-561-U2 Request for Reconsideration
5. SSA-3441-BK Disability Report - Appeal
6. HA-501-U5 Request for Hearing by Administrative Law Judge

7. HA-520-U5 Request for Review of Hearing Decision/Order
8. SSA-789-U4 Request for Reconsideration
9. SSA-454-BK Continuing Disability Review Report
10. Completing Social Security Appeal Online - Power Point - 9:45 Day 2

#### Section F: Blue Book

1. Hanna/Ritch DDS Determination - Power Point - 8:30 Day 1
  - a. Mental Status Report
2. Blue Book - Disability Evaluation Codes - Mental 12.00 Adult and 112.00 childhood
3. Compassionate Allowances Information
4. Presumptive Blindness or Presumptive Disability Payments
  - a. What if a claim does not meet a listing?

#### Section G: HHSC forms

1. Billable Medicaid Types by Program
2. Checklist for Adult/Child Applications thru HHSC
3. What is Medicaid?
4. Your Health Care Guide - Medicaid
5. Your Texas Benefits - Power Point Slides
6. H1010 - Your Texas Benefits
7. Addendum A-H1010-M Applying or Renewing Medicaid or CHIP
8. H1205 Application for Health Coverage and Help Paying Cost
9. H1200 - Your Texas Benefits 65 and older with Disabilities
10. H1200EZ-Application for Assistance -Aged and Disabled (Use this one to apply for MSP)
11. Medicaid Buy In information
12. Medicaid Buy In for Children Information
13. T-H1867 Healthy Texas Women Application Form
14. H1113 Application for Prior Medicaid Coverage
15. H1746- A Medicaid for Elderly and People with Disabilities (MEPD) HHSC  
USE ONLY

16. 0003 Authorization to Furnish Information
17. H3034 Disability Determination Socio-Economic Report
18. H3035 Medical Information Release/Disability Determination
19. H1028A Employment Verification (Aged and Disabled Programs)
20. H1003 Appointment of an Authorized Representative to Allow Another Person Act for You
21. Form 1826D Case Information Release

#### Section: H -Information Items

1. CBO Engaging, Case Summary MREs
  - a. Case Summary
  - b. Sending the Medical Electronic Records (MERS)
  - c. Electronic Records Express E.G.
2. NIMH Mental Health Medications
3. Definitions/Acronyms
4. Work Incentive Cheat Sheet
5. Letters after a SS or Medicare Number
6. 2019 SSA Fact Sheet
7. Ordering SSA Forms - how

#### Section I - Introduction to DDS

1. Social Security: With you through life's journey
2. Difference Between Medicaid thru HHSC and SSA
3. Consumer Benefits New Staff Training DDS/SSA Process
4. What Does DDS look for
5. Tips and How To's
6. **MBI-Medicaid Buy In (Add this power point to G11)**

#### Section J - Medicare Information

1. CBO Medicare/Medicare Saving Program-Cheryl Folks
2. Four kinds of Medicare Savings Programs and What They Cover

3. Medicare.gov Plan Finder Instructions
4. Medicare Prescription Drug Coverage
5. Medicare D and Extra Help Power Point
6. CMS Navigating the Medicare Plan Finder 2019

Section K: FAQ's

1. FAQ's