***** Tutorial: Case Examples *****

To help you learn the basic functions of the **Social Security Assist** program, here is a short tutorial.

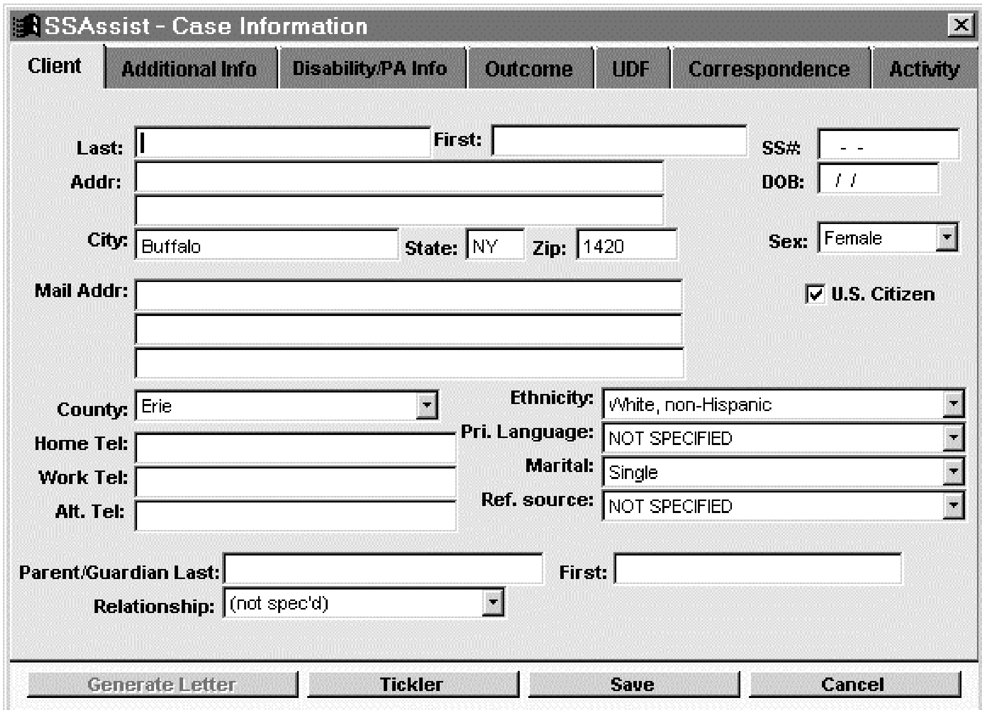
Logging In

When you run the **Social Security Assist** program, the log in window will appear:

Enter your user ID and password, then click OK. If you have not yet received your user ID and password, enter “USER00” as your ID and “DEMO” as your password. The main screen will be displayed.

Creating a New Case

You have just received a phone call from Larry Gordon, requesting assistance following his SSD claim denial. After you have logged into the program, go to the **Social Security Assist** menu and select **Create New Case**. A blank **Case Information** window will appear:

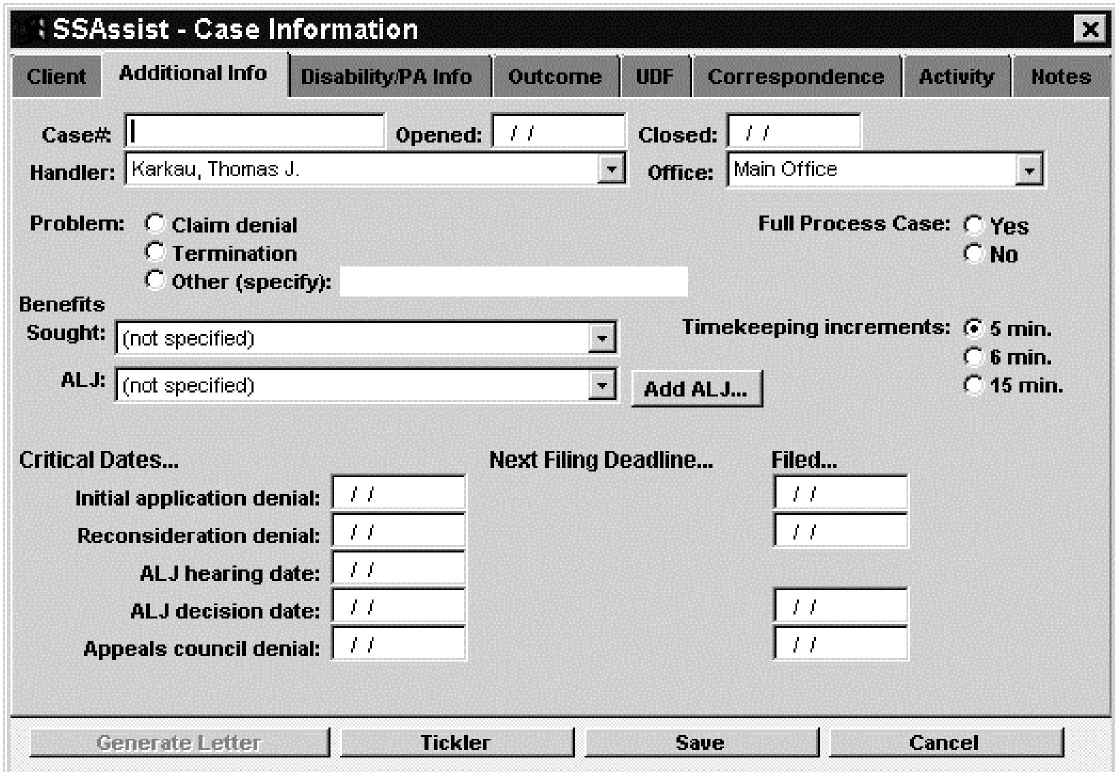


Enter the information below for the client on the first page:

- **Last name:** Gordon
- **First name:** Larry
- **Address and mailing address:** 4321 Main St., East Jahunga, NY 12345
- **County:** [your county]*
- **Home Telephone:** 716-963-1130
- **SS#:** 101-01-1111
- **DOB:** 05/25/63
- **Sex:** Male
- **U.S. Citizen**
- **Ethnicity:** White, non-Hispanic
- **Primary Language:** English
- **Marital Status:** Married
- **Referral Source:** Self-referral

* This information must be entered in the maintenance program. If the program has not been set up, choose “not specified” instead.

Once you have filled in Mr. Gordon's information on the **Client** page, click the tab labeled **Additional Info.** The page will then appear in the **Case Information Window**:

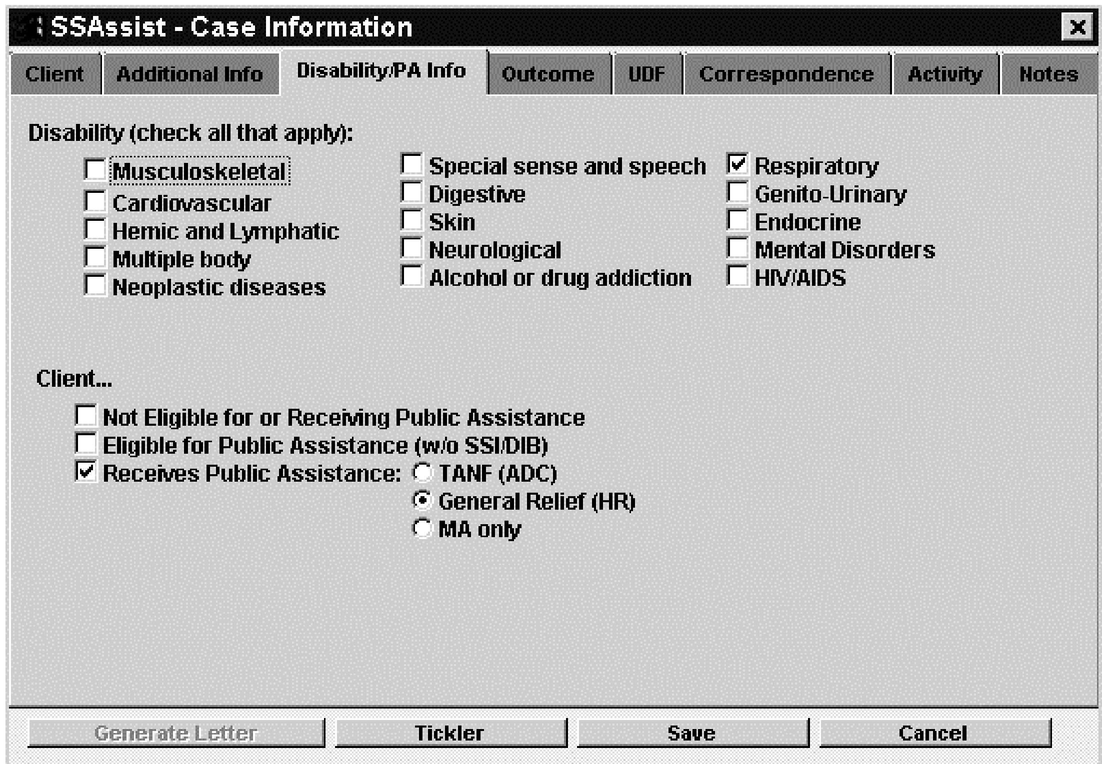


Input the following information about Mr. Gordon's case on this page:

- **Case#:** 999
- **Opened:** The current date
- **Handler:** Your name
- **Office:** Your office
- **Full Process Case:** Yes
- **Legal problem:** Claim denial
- **Benefits Sought:** Social Security Disability
- **Time Increments:** 15 minutes
- **Initial Application Denial:** 2 weeks before current date

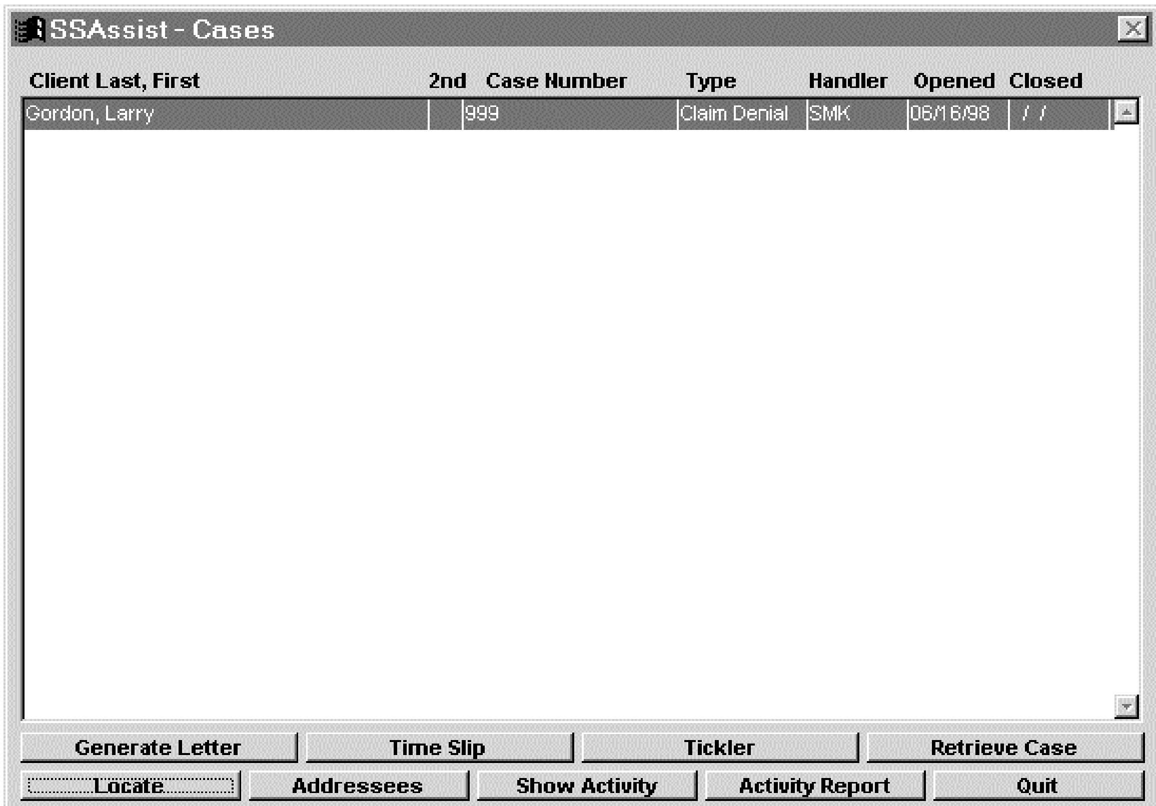
Leave the **Closed**, **ALJ**, **Hearing Date** and **Decision Date** and other fields blank, since this information is not yet known. You will notice that when you enter the date of the initial application denial, a date will appear in the **Next filing deadline…** column. This allows you to check deadlines on a case at a glance.

After entering the information about Mr. Gordon's case, click the tab labeled **Disability/PA Info.** This will cause that page to appear in the current window:



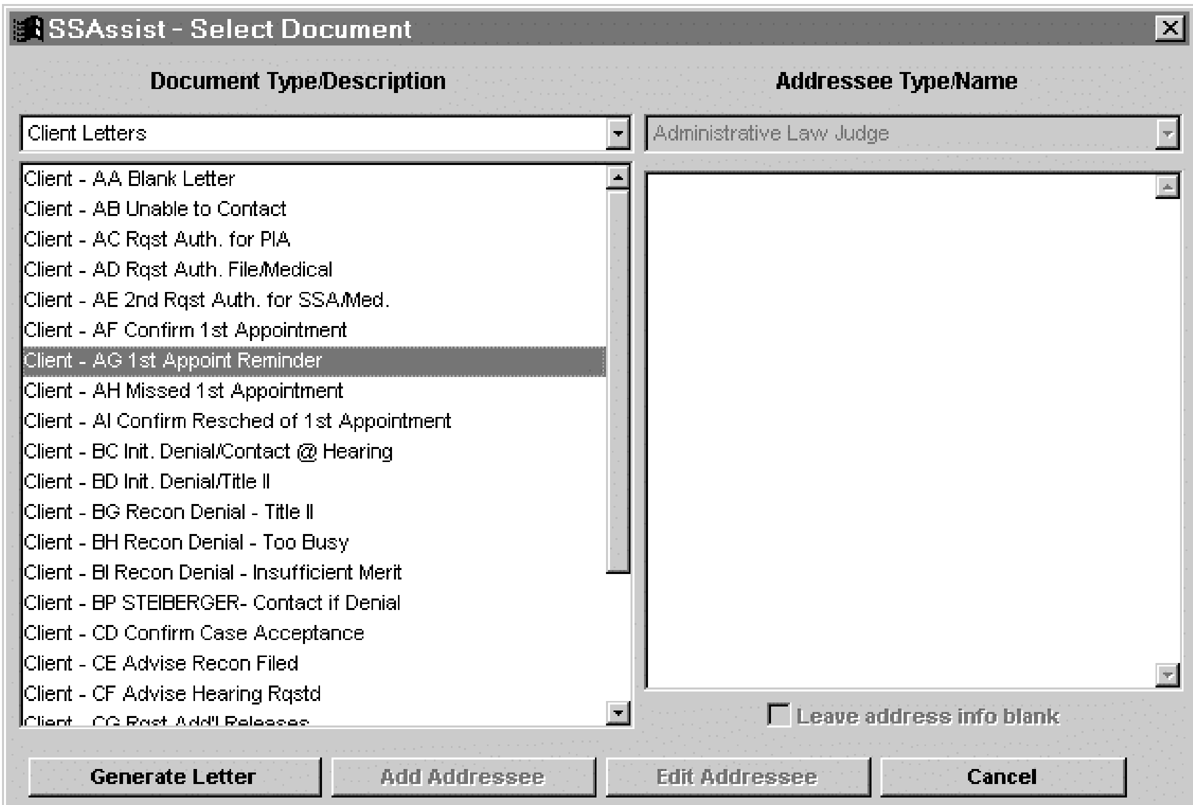
Place a check mark in the box labeled **Respiratory** to indicate the nature of Mr. Gordon's disability. In the **Client…**section, place a check mark in the **Receives Public Assistance** box and choose **General Relief (HR)** for the type.

You have now finished entering all the necessary information for a new case. Click the **Save** button at the bottom of the window to save this information. When asked if you want to clear the screen after saving, click **Yes**. Your personal case list will now contain Larry Gordon's case:



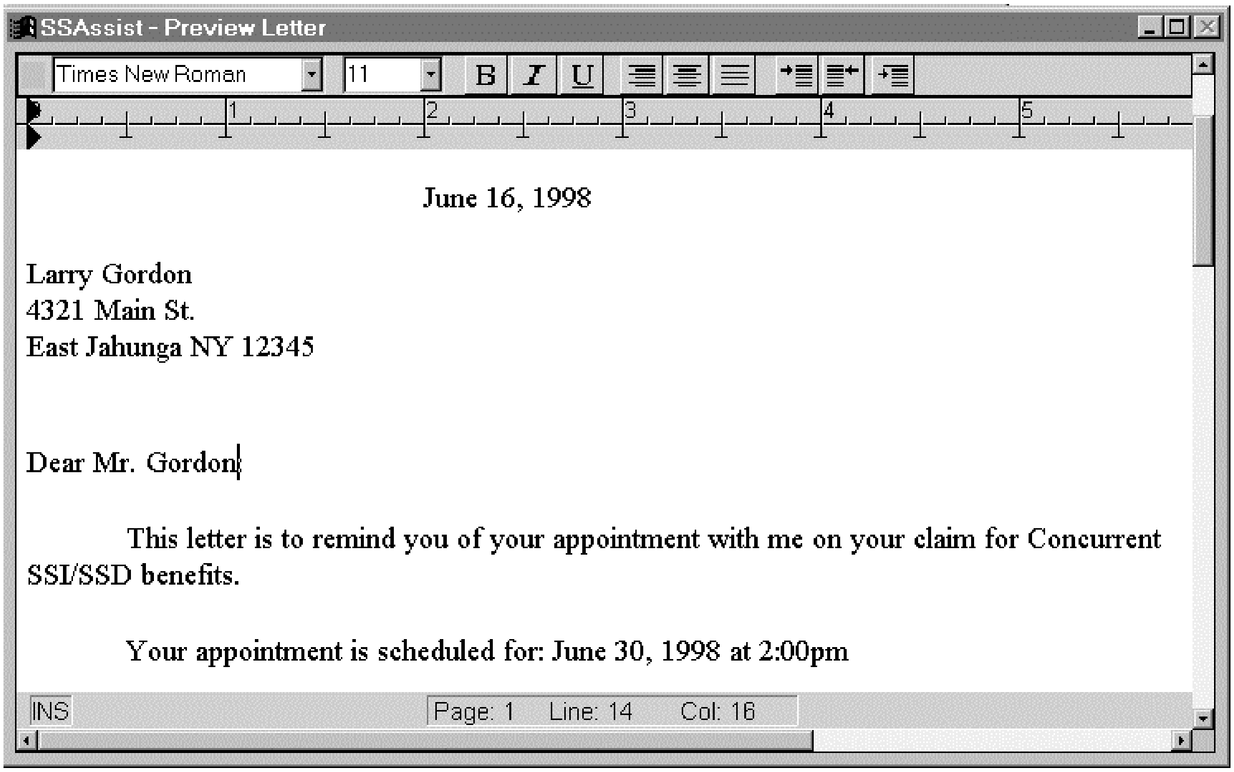
Generating a Client Letter

To remind Mr. Gordon of his first appointment and tell him what to bring, you want to send him a letter. To do this, highlight his name on your personal case list and click **Generate Letter**. This will bring up the **Select Document** window:

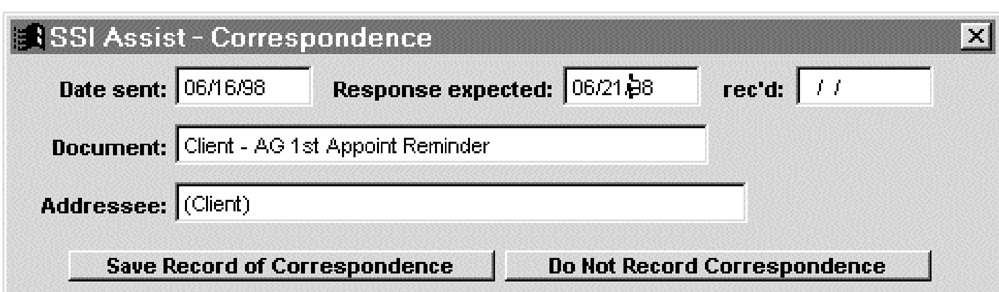


Since you want to send the letter to Mr. Gordon, choose "Client Letters" in the **Document Type/Description** menu. A list of letter templates will appear in the large box on the left. The **Addressee Type/Name** menu will be grayed out because client letters are automatically addressed to the client. Highlight the title "Client AG – 1st Appoint Reminder" and click **Generate Letter**. The word processor will then open the letter template in the **Preview Letter** screen.

The word processor will ask you to enter the date and time of Mr. Gordon's appointment and then display the text of the letter template. The letter will be filled in with the client's name and address as well as your name, title and the appointment date and time.



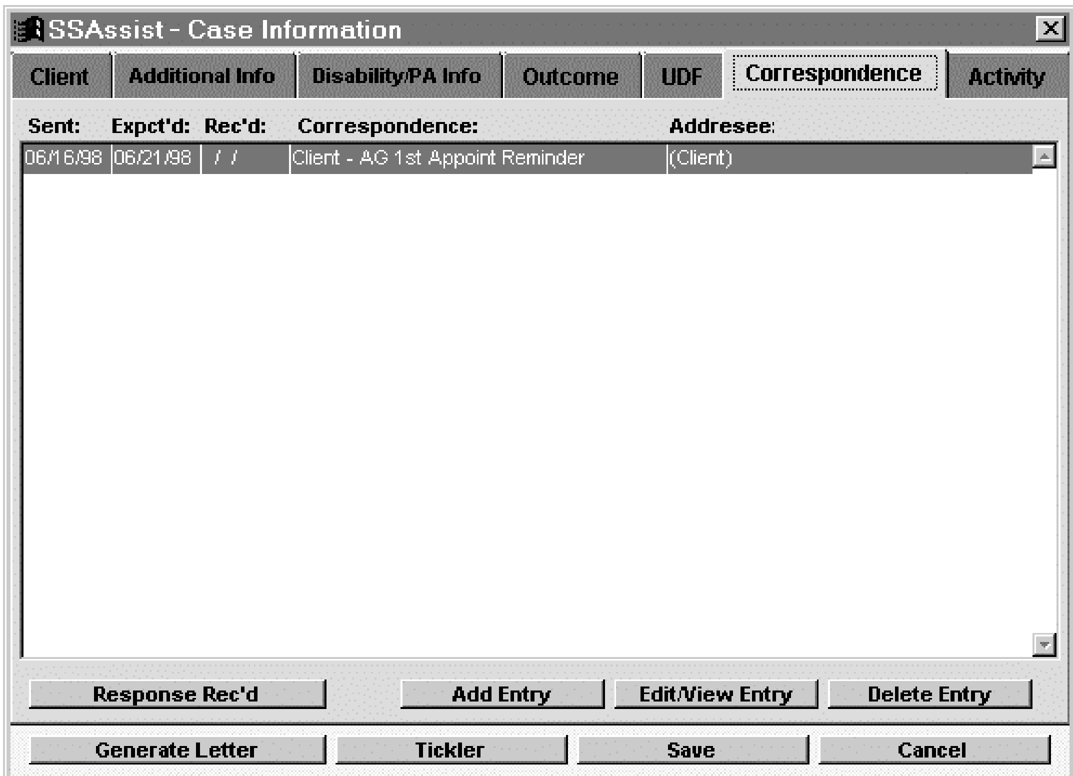
Now the letter is ready to be printed. Select the **Print** command from the **File** menu at the top of the screen. The letter will be printed. Go to **Close Screen** in the **File** menu to exit the word processor. When you close the **Preview Letter** window, the correspondence record screen will appear, containing information about the letter for the case correspondence file:



Leave the information in the window as it appears. Click **Save Record of Correspondence** to add this entry to Mr. Gordon's correspondence records. The window will close, returning you to your personal case list.

Updating Correspondence Records

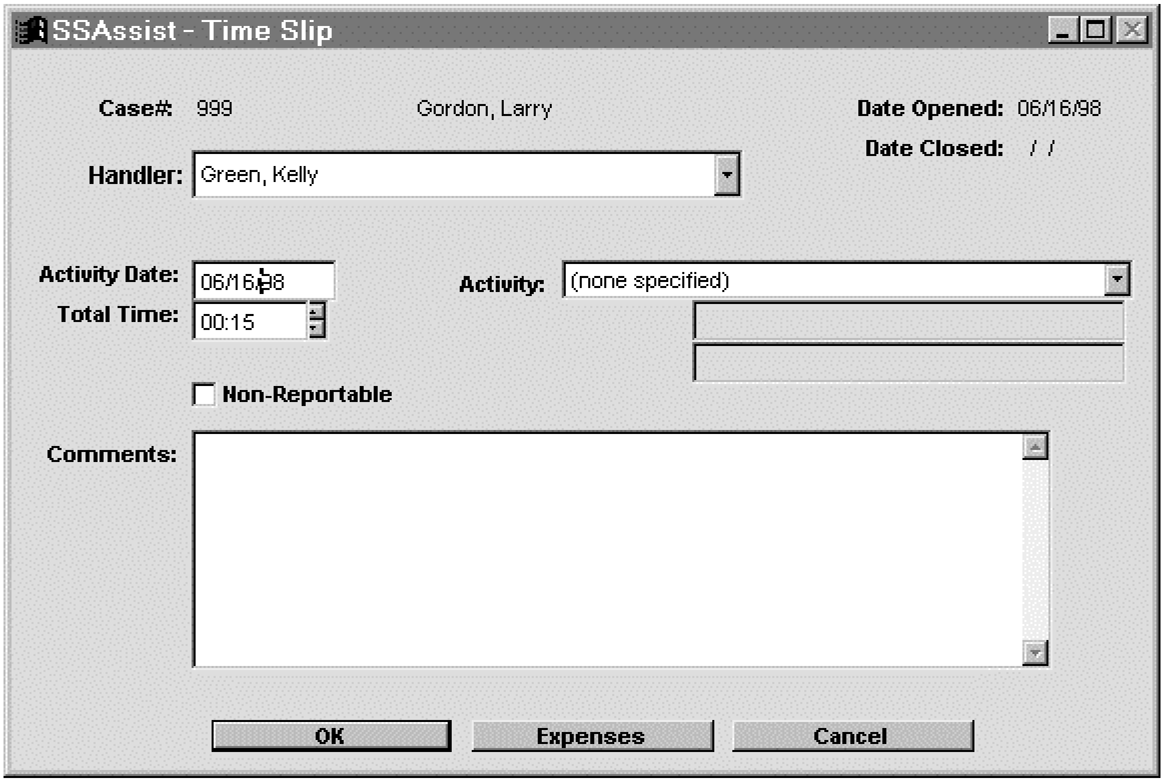
One week after you sent the letter to Mr. Gordon, you receive a letter from him stating that he will attend the scheduled meeting. You want to enter the date of his response in his correspondence file. To do this, highlight his name in your case list and click **Retrieve Case** to bring up the case information screen. Next, click the **Correspondence** tab to view the client's correspondence record. The screen below will be displayed.



To enter the receipt date of Mr. Gordon's letter, click **Response Rec'd**. Today's date will be entered in the **Rec'd** column.

Entering a Time Slip

To record the time spent on the letter to Mr. Gordon, you will need to enter a time slip. Click the **Time Slip** button at the bottom of your personal case list screen. This will display the **Time Slip** window:

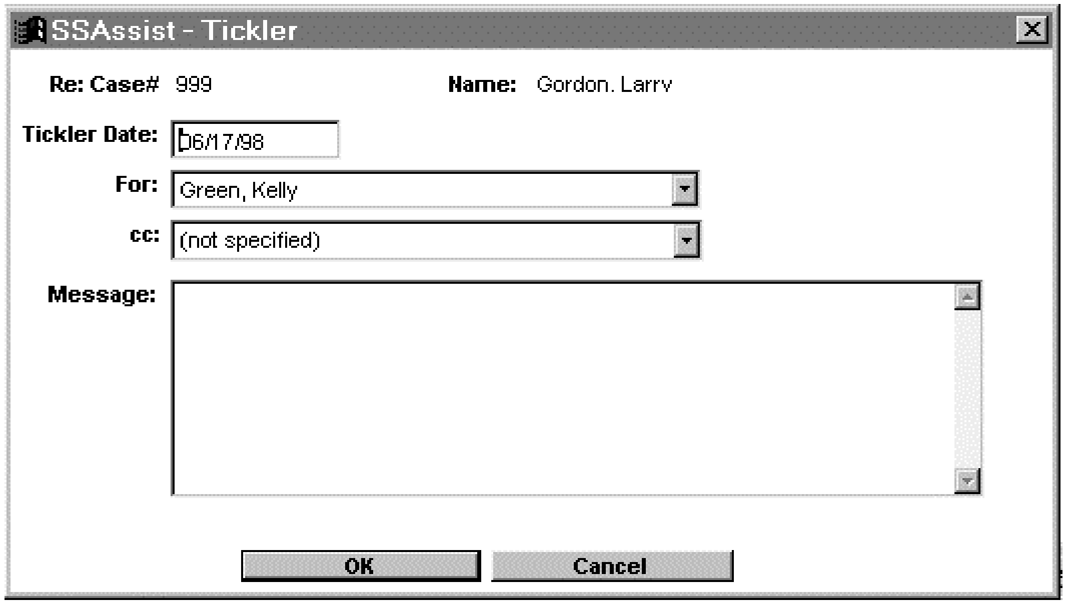


Select **Letter** from the **Activity** menu. The **To:** and **Re:** data fields will appear below the menu; enter “Larry Gordon” in the **To:** field and “first appointment” in the **Re:** field. Set the total time to 30 minutes. When the time slip is complete, click **OK** to save it and exit to the personal case list.

To view the record of your activity, highlight Larry Gordon’s case and click **Retrieve Case.** This will return you to the case information screen. Now click the tab labeled **Activity**. The information from the time slip you just entered will be listed in this window. To print a report of the activity, highlight the case in your case list and click the **Activity Report** button.

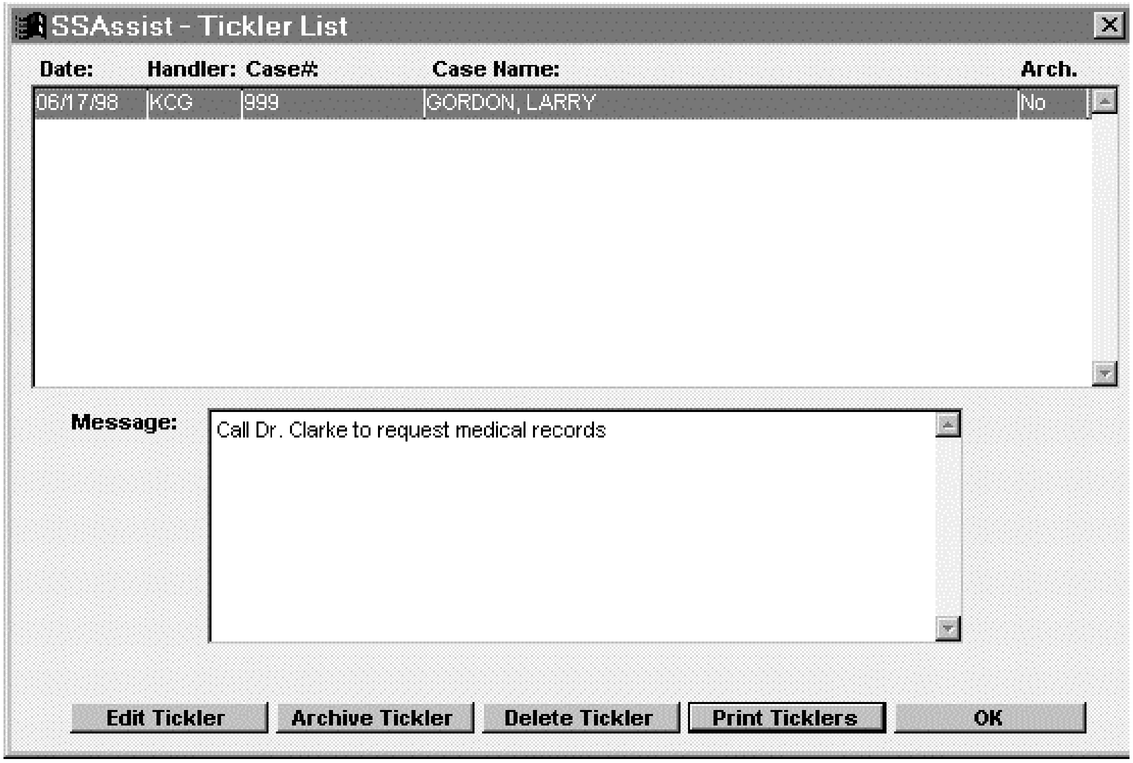
Using Ticklers

To remind yourself of your meeting with Mr. Gordon, you will create a tickler. Highlight the case and click the **Tickler** button at the bottom of the personal case list screen. The tickler window will be displayed:



Enter the date of Mr. Gordon's appointment for the tickler date. In the **Message:** box, enter "Appointment with Larry Gordon at 2pm, re: SSD". Leave your name in the **For:** field and the **cc:** field blank. Click OK to save the tickler and return to your case list.

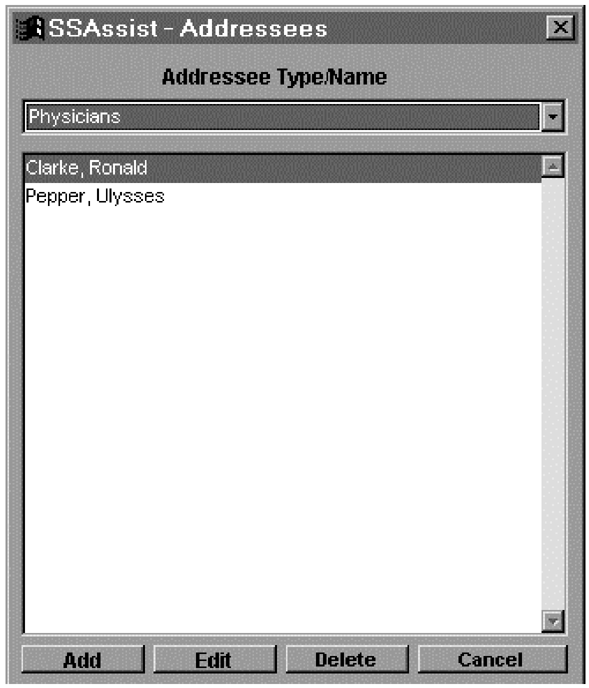
To view the tickler list now, go to **Tickler Maint.** in the **Social Security Assist** menu. When you log in on the date of Larry Gordon's appointment and at each log-in thereafter, the tickler list will be displayed.:



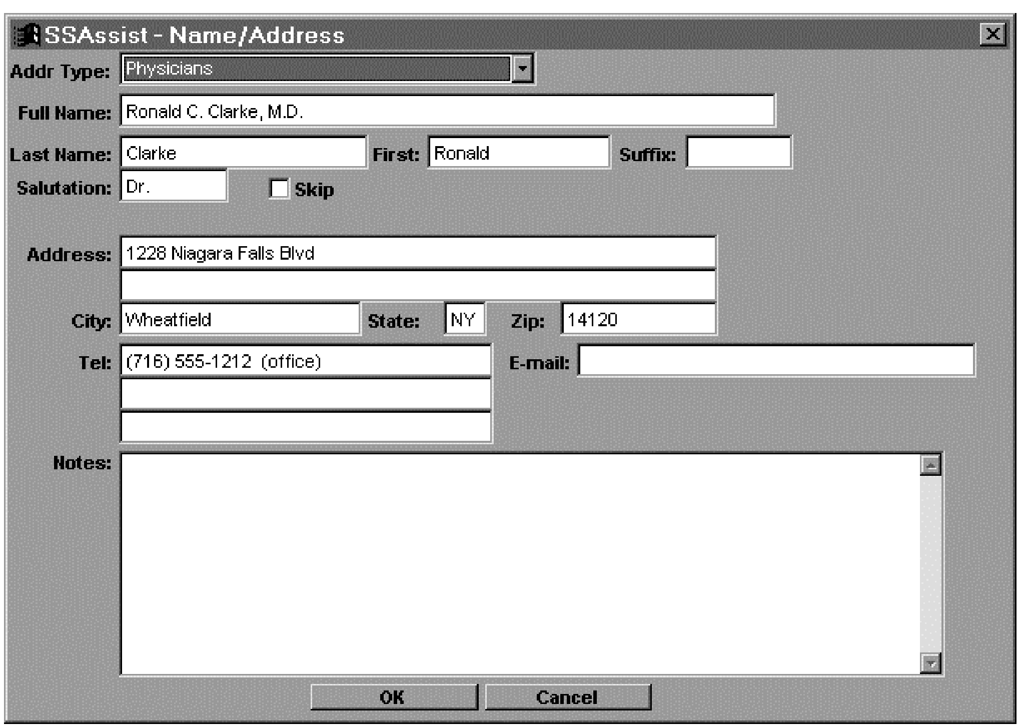
Click **Print Ticklers** to make a hard copy of the tickler. Now that you have seen the tickler and made a hard copy, it is no longer necessary. Click **Delete Tickler** to remove it from the system.

Adding an Addressee to the Database

You need to write a letter to Larry Gordon’s doctor requesting his medical records. Before you do this, you will have to enter the doctor’s name and address information into the database. To enter the information, click **Addressees** at the bottom of the **Cases** screen. The following window will be displayed:



For the addressee type, select “Physician”, then click **Add** at the bottom of the screen. The **Name/Address** screen will appear:



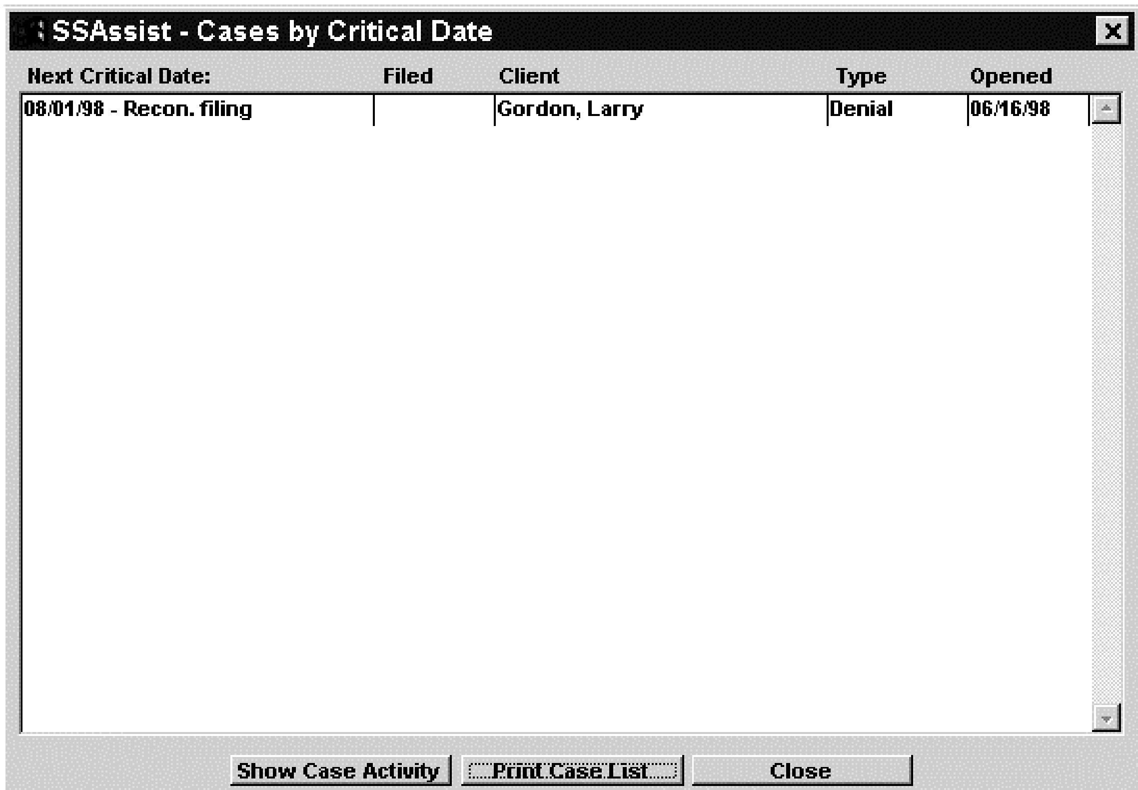
Enter the following information in the appropriate fields of the **Name/Address** screen:

- **Full Name:** Harold Robins M.D.
- **Last Name:** Robins
- **First Name:** Harold
- **Salutation:** Doctor
- **Address:** 1354 Swan Lane
- **City:** Eagleville
- **State:** NY
- **ZIP code:** 13131
- **Phone:** 654-3210
- **E-mail:** hrobin@doctor.com

Now that you have entered the address, click **OK** on the **Name/Address** screen and **Cancel** in the **Addressees** window. Now click **Generate Letter** at the bottom of the **Cases** screen. Select "Physician Letters" for the document type, and Dr. Harold Robins as the addressee. Next, select letter FB (Rqst. Docs/Eval) and click **Generate Letter**. This will bring up the **Preview Letter** window. Print the letter as you did in the previous example, then exit the word processor and record the correspondence.

Using Critical Dates

As you are preparing to file Larry Gordon's application for reconsideration, you want to check the filing deadline. Go to **Critical Dates** in the **SSAssist** menu. The screen below



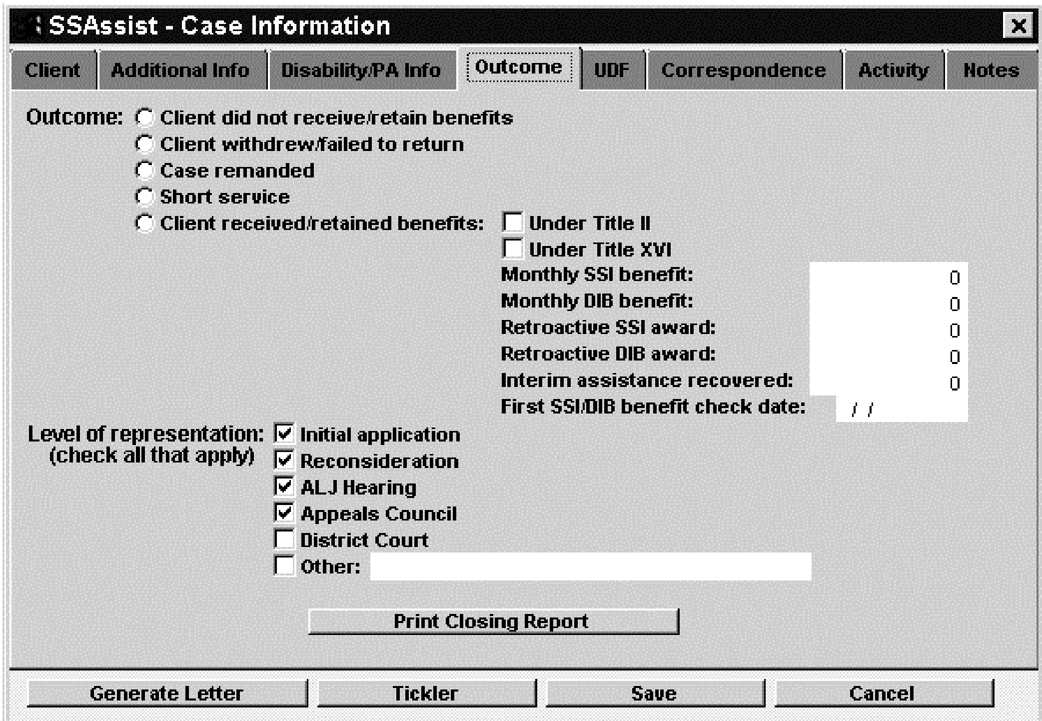
will appear:

A complete list of critical dates for all your cases is shown on this screen. The first cloumn shows the event and the critical date, the second column shows the date that filing was completed, followed by client name, case type and open date. In the example above, the deadline for Mr. Gordon's reconsideration filing is August 1, 1998.

Now assume that you have filed for reconsideration of Mr. Gordon's claim and you want to enter the filing date into the system. Retrieve the case, then click the **Additional Info** tab. In the first **Filed…** field, enter today's date. In the future, when you view your list of critical dates, the filing date will be displayed so you know the deadline was met.

Closing a Case

Several days later, you receive notice that Mr. Gordon's reconsideration application was approved. Mr. Gordon is awarded $500 per month in benefits. To close the case, highlight it in your personal case list and click **Retrieve Case**. When the case information window opens, click the tab marked **Additional Info.** Enter the meeting date in the **Closed:** field. Now click the tab labeled **Outcome**. The following screen will

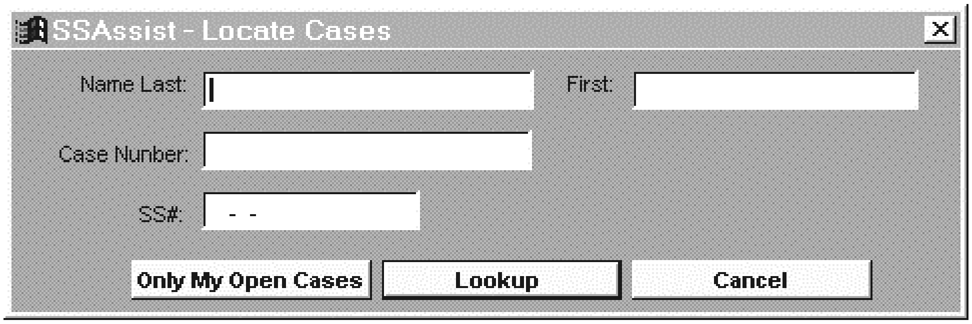


be displayed:

Mark the circle next to **Client received/retained benefits.** Check the box next to **Under Title XVI** and enter "500.00" for the monthly DIB benefit. For the level of representation, check **ALJ** Hearing. Then click **Print Closing Report**. The closing report will be printed. After it has finished, log out of the system. The next time you log in Larry Gordon's case will not be displayed on your personal case list.

Looking Up a Case

Several days after closing Mr. Gordon's case, you want to make another copy of the closing report. To retrieve the case, click the **Locate** button at the bottom of your case list screen. The window below will be displayed:



Enter "999" in the **Case Number:** field and click **Lookup**. You may also look up the case by entering client name or by Social Security number, but be sure to use only one of these search criteria. If you use more than one, an error message will appear. After a few seconds, a case list will appear, containing Larry Gordon's case. To reprint the closing report, click **Retrieve Case** and go to the **Outcome** page of the case information window. The **Print Closing Report** button is at the bottom of the page.

You have now finished the **Social Security Assist** tutorial and learned how to use the letter generating, tickler and timekeeping functions. For more information about these and other program functions, see the next section of the manual.