



**Health Care Agency  
Behavioral Health Services  
Policies and Procedures**

Section Name: Care and Treatment  
Sub Section: Benefits Acquisition  
Section Number: 01.05.01  
Policy Status:  New  Revised

Chief of Operations  
Behavioral Health Services

SIGNATURE

DATE APPROVED

**SUBJECT:**

Assisting Consumers in Applying for SSI Benefits

**PURPOSE:**

To assist consumers to apply for Social Security Supplemental Income (SSI) benefits by providing a timely response to requests for records.

**POLICY:**

For each consumer, staff shall assess the potential need for application for benefits, and shall facilitate the application process.

**SCOPE:**

All Orange County Health Care Agency Behavioral Health Services consumers who are receiving Mental Health Services.

**PROCEDURE:**

- I. At time of intake, and on an ongoing basis throughout the time the consumer is receiving mental health services, staff shall assess the potential eligibility of the consumer for benefits.
- II. For those consumers assessed to be potentially eligible for benefits, the staff shall:
  - A. Complete SSI application.
  - B. Complete the Mental Disorder Questionnaire and keep in file until requested by Social Security Administration (SSA).
  - C. Gather all HCA records to ensure they are located in one location. Request admission and discharge summaries from all previous admissions for which documents have been placed in microfiche and any other information requested by SSA.
  - D. Include the application for benefits on the treatment plan.

- III. When a SSA request for records is received:
  - A. Staff shall identify the requested paperwork to be copied.
  - B. Office Support shall copy the identified paperwork and the Mental Disorder Questionnaire.
  - C. Service Chief shall review the Authorization to Disclose (ATD) for completeness, sign release of records and then notify the Custodian of Records that records have been released.