

**PRESENTED AT**

17<sup>th</sup> Annual Changes and Trends Affecting Special Needs Trusts

February 18-19, 2021  
Austin, TX

**SSA Regional Trust Leads Presentation Regarding  
SSI Trusts**

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SSA Regional Trust Leads Presentation  
Regarding SSI Trusts

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## Objectives (1/2)

- ▶ Review general and trust-specific reporting responsibilities
- ▶ Review 2020 POMS update
- ▶ Provide an overview of the Regional Centralization of SSI Trust Review Business Process, including step-by-step scenario

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## Objectives (2/2)

- ▶ Provide fiscal year 2020 case totals
- ▶ Q&A Session (if time permits)

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## Disclaimer

- ▶ This presentation discusses general SSI trust policy and procedures.
- ▶ Specific case scenarios involving an SSI claim or post-eligibility (PE) event require initial evaluation by the servicing field office (FO) technician and subsequent evaluation by the regional trust reviewer team (RTRT).

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