

PRESENTED AT

17th Annual Changes and Trends Affecting Special Needs Trusts

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

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1

1

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

2

2

Objectives (2/2)

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

3

3

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).

4

4

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Also available as part of the eCourse

[Best Practices for Working with the Social Security Administration \(2021\)](#)

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