Instructions for the Completion of the LDSS-2474

Section I. Client Identification Information

This section must be completed by the agency initiating the referral. DSS Case Number and CIN should be included if available at the time of the referral.

To assist the SSA in establishing a "protective filing date" for TA applicants and recipients, districts must fill out LDSS-2474, Section I, the "Date of Most Recent Temporary Assistance Application or Recertification" field. This field represents the application or recertification date that is closest to the date found in Section II, Referral. Therefore, a district worker must determine the date of the applicant/recipient's application date and/or recertification date (the recertification date is the date a signed and dated recertification form is submitted to the district), and the application or recertification date closest to the date found in Section II Referral, must be used to complete the field.

A protective filing date is assigned by the SSA and allows TA applicants and recipients who apply for SSI within 60 days of signing a TA application or recertification form to use the TA application or recertification date as the SSI application date. When the SSA establishes a protective filing date, the TA applicant/recipient may be eligible for up to two additional months of SSI. In addition, this may increase the amount of interim assistance reimbursement the district recovers from the SSA.

Section II. Referral

This section also must be completed by the agency initiating the referral. The appropriate box indicating the purpose of the referral should be checked.

For district-initiated referrals for SSI and SSD based on disability, the nature of the client's impairment(s) should be described. All available documentation should be attached and its presence indicated by checking the appropriate box(es).

Section III. Certification of SSA Contact

This section should be completed by SSA when the LDSS-2474 is initiated by a district. When signed by SSA, this form becomes documentation that the client has taken the action necessary to comply with the requirement to file for and pursue SSI eligibility.

Section IV. Certification and Release Authorization

This section always must be signed by the client at the time the referral is initiated. If another person is acting on behalf of the client, that person's relationship to the client must be indicated.

As noted in Section V of this Directive and in the release language itself, the client has the option of deleting authorization to release information from the client's medical assistance case records by drawing a line through "and medical assistance" on the release.