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Local Commissioners Memorandum

Section 1

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| Transmittal: | 07-LCM-04 |
| To: | Local District Commissioners |
| Issuing Division/Office: | Office of Temporary and Disability Assistance/Division of Employment and Transitional Supports |
| Date: | May 10, 2007 |
| Subject: | <i>SDX – SSI Individual Status</i> Screen on WMS |
| Suggested Distribution: | Temporary Assistance Directors, Food Stamp Directors, Employment Coordinators, Medical Assistance Directors, Staff Development Coordinators, and WMS Coordinators |
| Contact Person(s): | 1-800-343-8859; SSI Questions – SSI Bureau (518) 473-0332; FS Questions – Food Stamp Bureau (518) 473-1469; TA Questions – Temporary Assistance Bureau (518) 474-9344; WMS Questions – WMS Bureau (518) 474-8749; Metro Region (212) 961-8207; MA Questions – (518) 474-5693 |
| Attachments: | Attachment A: User Instructions for the <i>SDX – SSI Individual Status</i> Screen on WMS |
| Attachment Available On – Line: | X |

Section 2

I. Purpose

The purpose of this LCM is to announce that the new 3-page *SDX – SSI Individual Status* screen is now available on the Welfare Management System (WMS). This newly-developed WMS screen displays information on all persons that have applied for, received, ceased to receive, or were denied Supplemental Security Income (SSI).

Attachment A provides samples of the 3-page screen as well as the user instructions which include a list of field names and descriptions that are on the new screen. The field names and codes are taken from the *SDX Manual*.

The *SDX Manual* can be viewed at the OTDA intranet website under the Division of Employment and Transitional Supports, under Manuals or at

<http://otda.state.ny.net/dta/Manuals/sdx.pdf> . It is also available on CentraPort under Resources.

II. Background

The concept of accessing an individual's SSI status information from WMS was first discussed in 2004. Once the design was finalized, the labor intensive part of the project became identifying and loading the State Data Exchange (SDX) data elements onto the Welfare Reporting Tracking System (WRTS). The data displayed on the *SDX – SSI Individual Status* screen is loaded back to October 2002. No history is provided on the screen except for the NET PAY fields which display the current payment amount and up to three previous payment amount changes.

Once a person has applied for SSI and the Social Security Administration (SSA) has created a computer record of this application, the data from this application will appear on WRTS within two business days. Once SSI data appears, it will remain on WRTS indefinitely. However, please note that the SDX screen only displays current data.

The *SDX – SSI Individual Status* screen on WMS is accessed through the Time Limit Tracking menu. From the main menu select 17, then select K, and enter a Social Security Number. In NYC, select 11 from the WMS main menu. Page 1 of the screen will display information regarding an individual's SSI status, benefits, appeal and denial codes as well as unearned income. Page 2 provides Medicaid, New York State Nutrition Improvement Program (NYSNIP), and Alien information, and page 3 displays address information including the representative payee address and the recipient's mailing address.

The WMS/CNS Coordinator Letter and Attachment entitled "Introduction of SDX – SSI Individual Status Inquiry Screen" was released on March 12, 2007, and informed local districts that the *SDX – SSI Individual Status* screen on WMS became available on March 19, 2007.

III. Program Implications

SDX – SSI Individual Status screen

The new *SDX – SSI Individual Status* screen allows local district staff to access timely, authoritative information on a person's SSI status, including appeal and denial status. The new screen will enable workers to access SSI information quickly and easily which will improve service, decrease errors and diminish the calls to the Social Security Administration (SSA) for SSI information. The data can be used to assist local workers in determining eligibility and benefits for Medicaid, food stamps, cash assistance, HEAP and other programs.

Items posted to SSA's database will be available on the *SDX – SSI Individual Status* screen within two business days.

Note that the *SDX – SSI Individual Status* screen only provides information on regular Social Security benefits when the person has also applied for SSI.

State Online Query (SOLQ) System

Districts currently may request authorization to use the State Online Query (SOLQ) system. SOLQ allows authorized users to conduct real time queries into Social Security Administration databases. Like the new *SDX – SSI Individual Status* screen, SOLQ provides a variety of SSI data. However, SOLQ also provides information on recipients of regular Social Security (Title II) benefits, including eligibility dates and appeal information. This data can be used to assist local workers in determining eligibility and benefits for Medicaid, food stamps, cash assistance, HEAP and other programs.

Items posted to SSA’s database will be available on SOLQ on the next business day.

For more information on SOLQ, please refer to OFT Bulletin 07-CSM-03 or contact the SSI Bureau at the number noted above in the Contact Person section.

IV. Security

The SSA has been very concerned that the security and confidentiality of SSA data be maintained. To address this concern, OTDA has signed agreements with SSA to assure SSA that local districts are aware of their responsibility to insure that SSA data will only be used for legitimate business purposes. All users must abide by security and confidentiality rules or be subject to penalties that range from loss of access to SSA data to criminal charges depending upon the nature and severity of the breach.

OTDA is currently in the process of signing a new security agreement and local districts will be notified what, if any, changes to access, policy or procedure result from OTDA’s obligations pursuant to this agreement.

Issued By

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Division/Office: Division of Employment and Transitional Support