

# Master Trust Tip Sheet - Finance

## **Supplemental Security Income (SSI):**

Social Security has a strict definition of disability for children:

- The child must have a physical or mental condition(s) that very seriously limits his or her activities; **and**
- The condition(s) must have lasted, or be expected to last, at least 1 year or result in death.

## **Social Security Administration (SSA):**

- The child must have a deceased parent(s); or
- The child qualifies for benefits from a parent(s) disability

When a need is identified, The Child Welfare Professional will complete the paper application for Social Security. Once completed, it will be sent to Information and Eligibility (I&E). If assistance is needed attaining medical records or scheduling appointments, The Child Welfare Professional can reach out to the Behavioral Health Care Coordinator.

IEM role's is generally to accept initial/re-determining SS applications filled out by The Child Welfare Professional, review that all appropriate questions have been answered by The Child Welfare Professional and that any required documentation needed with the application is included in their packet. Once IEM's review is complete, IEM will mail the packet to the SS office.

From that point IES will follow up with the status of the application with Jeanette or Mickie (EF Master Trust) once every month after the first 90 days have lapsed since the application was sent. IES is also responsible for tracking the status of the application in Argos.

Once an award letter is received, IES will once again update the tracker in Argos and upload the letter to the file cabinet in FSFN. This completes IES involvement with the Master Trust process; until the child moves to a non-licensed placement, gets reunified or ages out – IES will again update tracker in Argos.

Jeanette and Mickie are responsible for managing and maintaining a child's Master Trust account once one is established.

Attached to this tip Sheet is the check list of documentation that is needed depending on the application. The application forms can be found at: <https://www.ssa.gov/forms/>

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## **If a Master Trust has already been established or the child was granted an award letter:**

The award letter, balance and transaction report, and Case Manager Responsibility letter will be provided to The Child Welfare Professional, CMA POC, and IES. The Child Welfare Professional will receive a monthly balance report, and the Notice and Fees Assessment and Rights of Foster Child (285), and award letter every three months. The Child Welfare Professional will be provided these letters. These documents will need to be submitted to the court during the Judicial Review.

## **If the child needs Master Trust used to purchase an expenditure or allowance:**

The Child Welfare Professional will need to use a Client Disbursement Request Form and have their supervisor, child, and program director sign the form (if the purchase is over \$500). There is also a requirement to obtain GAL and Court Approval for expenditures that exceed \$500. The form is then reviewed by an Embrace Families representative and sent to the Master Trust representative for final approval. After the request is approved, the agency will purchase the item and is then reimbursed within 5 business days after original receipts.

## **If the child is provided allowance:**

The Child Welfare Professional sends the Client Disbursement Request form signed by their supervisor through the POC to Master Trust for approval. Once approved, the child will be sent a check through the worker for \$40 dollars. The child is required to provide receipts for all purchases with SS money.

## **If the child's circumstances change:**

**Juvenile Detention** – (30 consecutive days) Payment will be suspended and possible overpayment notice

**Hospital** – (30 consecutive days) Payment will be decrease to \$30 a month and possible overpayment notice

**Runaway** – (30 consecutive days) Payment will be suspended and possible overpayment notice

**Released from Foster Care** – Payment will be suspended until a new payee is selected.

The Embrace Families Master Trust Accountant will need to return Conserved Funds to the Social Security Administration.

## **Master Trust Agency Point of Contacts**

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<b>Children's Home Network</b>	To be Determined
<b>Children's Home Society (East)</b>	James Jenkins (407) 848-0830 <a href="mailto:James.Jenkins@chsfl.org">James.Jenkins@chsfl.org</a>
<b>Children's Home Society (Seminole)</b>	Christina Brantley (407) 683-3302 <a href="mailto:Christina.Brantley@chsfl.org">Christina.Brantley@chsfl.org</a>
<b>Gulf Coast (Osceola)</b>	Samantha Lunsford (407) 385-2434 <a href="mailto:Samantha.Lunsford@EmbraceFamilies.org">Samantha.Lunsford@EmbraceFamilies.org</a>
<b>One Hope United (West)</b>	Doris Diaz (863) 414-5647 <a href="mailto:ddiaz@onehopeunited.org">ddiaz@onehopeunited.org</a>  Diana Campbell (321) 207-8234 <a href="mailto:dcampbell@onehopeunited.org">dcampbell@onehopeunited.org</a>
<b>Orange County West and Seminole County Master Trust Specialist</b>	Jeanette Lugo Work: 321-441-2329 Mobile: 407-234-8323 <a href="mailto:Jeanette.lugo@EmbraceFamilies.org">Jeanette.lugo@EmbraceFamilies.org</a>
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<b>Embrace Families Finance and Master Trust Director</b>	Denise Bower Work: 407-681-2344 Mobile: 407-415-0456 <a href="mailto:Denise.Bower@EmbraceFamilies.org">Denise.Bower@EmbraceFamilies.org</a>