



SOCIAL SECURITY ADMINISTRATION
EXPEDITED CLAIMS PROCEDURES
FOR
MILITARY SERVICE CASUALTIES

April 4, 2003



INFORMATION REGARDING SURVIVORS BENEFITS **FOR FAMILIES OF MILITARY SERVICE MEMBERS**

Social Security benefits can be paid to the following survivors:

- Widow or widower at any age who takes care of a child (under age 16) of the deceased;
- Unmarried children under 18 (or up to age 19 if attending elementary/secondary school full time);
- Disabled children of any age who became disabled before age 22;
- Widow or widower age 60 or older; age 50 or older if disabled;
- Parent of deceased, age 62 or older if receiving ½ support from deceased before the death occurred;
- Special one-time-only lump sum payment of \$255 to spouse or minor children under certain circumstances.

When you are ready to file, you may choose to:

1. Call a special toll-free number **1-866-777-7887 between 7:00AM-4:00PM ET M-F** for families of Military Service members and we will take your claim right away over the telephone using our expedited process. Please have ready (if available):
 - the name, social security number, date of birth, and date of death of the deceased,
 - the name, date of birth, social security number for yourself and any other survivors (if you do not have these immediately available, we can still take your claim).
- NOTE:** Hearing impaired family members of Military Service members may contact us at **TTD/TTY 1-866-545-7316 between 7:00AM-4:00PM ET M-F** to have your claim taken right away over the telephone using our expedited process.
2. Call our regular toll-free number **1-800-772-1213 between 7:00AM-7:00PM Local Time M-F** and ask us to schedule an in-office or telephone appointment for you or have someone at your local office call you if you prefer not to use our expedited telephone claims process in #1.
 3. Visit your local office if you prefer not to use our expedited telephone claims process in #1. If you are not sure where the office is located, check your telephone directory, call our regular 800 number in #2 above, or visit us on the web at **www.socialsecurity.gov** (click on How To, then How to Find Your Local Office).

Our goal is to provide courteous and compassionate service.

We are here to help. Contact us when you are ready.

SSA EXPEDITED PROCEDURES RELATED TO MILITARY SERVICE CASUALTIES

Introduction

- SSA has invoked disaster/emergency procedures for survivors claims as a result of the war in Iraq.
- This procedure includes any casualties of any Military Service member, regardless where the death occurred (i. e., in the United States or on foreign soil), during Operation Iraqi Freedom.
- We are implementing a process to expedite payment to their families. In most cases, the claim will be processed for payment within 48 hours.

Eligibility

- Widow or widower at any age who takes care of a child (under age 16) of the deceased;
- Unmarried children under age 18 (or up to age 19 if attending elementary/secondary school full time);
- Disabled children of any age who became disabled before age 22;
- Widow or widower age 60 or older (or age 50 or older if disabled);
- Parent of deceased, age 62 or older if receiving 1/2 support from deceased before the death occurred;
- Special one-time-only lump sum death payment of \$255 to spouse or minor children under certain circumstances.

Payment of Benefits

- Social Security benefits are paid the month after the month for which entitlement occurs (e. g., the benefits for the month of March will be paid in April).
- Benefits are payable beginning with the month of death, as long as all other entitlement factors are met. For example, the Social Security Number Holder (NH) died 03/20/03 and there is a widow(er) and 2 children eligible for benefits. Both children were born in or before March 2003. The widow(er) and both children would be entitled to monthly Social Security survivor benefits effective March 2003. However, the actual payment for March entitlements will be issued in April.
- Since June 1997, SSA issues recurring benefits on four days throughout the month: on the 3rd of the month (for beneficiaries entitled to benefits before June 1997) and on the second, third and fourth Wednesdays of the month. The day of birth of the NH is used to determine the assigned payment day (e.g., if the day of birth is 1 – 10, the check will be issued on the second Wednesday of the month; if the day of birth is 11 – 20, the check will be issued on the third Wednesday of the month; if the day of birth is 21 – 31, the check will be issued on the fourth Wednesday of the month). The award letter sent to the survivors will tell them which is their assigned payment day. However, if the issuance of the check on the second, third or fourth Wednesday of the month will cause hardship for the survivor, we can change the issuance date to the 3rd of the month. The CAO or survivor will need to tell us to make this change.
- If benefits are due for a prior month(s), these benefits will be paid immediately. This check should be received within 5 business days.

Expedited Telephone Claims Process

- The Philadelphia Immediate Claims Taking Unit (ICTU) will take survivor benefit claims over the telephone using our expedited process.
- A special toll free telephone number has been established for these claims: **1-866-777-7887**.
- The hours of operation for this special toll-free telephone number are 7:00 A.M. to 4:00 P.M., Eastern Time, Monday to Friday.
- Voice mail has been set up on the special toll free telephone number in case the CAO or survivor calls that line directly after 4:00 P.M., Eastern Time. The message will tell the CAO or survivor to leave their name, telephone number, the best time to call, and SSN of the person on whose record they are claiming benefits. The Philadelphia ICTU will return the call the next business day.
- Hearing impaired survivors may use a special toll-free **TTD/TTY telephone number of 1-866-545-7316**. The hours of operation are the same as above.
- If the Casualty Assistance Office (CAO) or survivor calls SSA's national 800 number (**1-800-772-1213**) and chooses to use the expedited telephone claims process, our phone agent will transfer the call to the Philadelphia ICTU to have the claim taken right away over the telephone using our expedited process.
- If the caller prefers to visit their local Social Security office, our national 800 number phone agent will either set up an appointment for the survivor or provide the local Social Security office location and telephone number.
- If the CAO or survivor calls the local Social Security office, the local office will offer the survivor the Philadelphia ICTU special 800 number (**1-866-777-7887**). However, if the survivor prefers to deal with the local office, the local office will set up an appointment or inform the survivor that they can just walk into the office to have the benefit claim taken. This claim will also be expedited.
- If the CAO or survivor calls SSA's national 800 number after 4:00 P.M. Eastern Time, and the survivor chooses to use the expedited telephone claims process, the phone agent will inform the caller:
 - no one is available to take their claim immediately;
 - a representative will call them tomorrow
 - ask the caller what is the best time to contact them
 - and fax all this information to the Philadelphia ICTU
 - the Philadelphia ICTU will call the survivor the next business day.
- In case of difficulty reaching the special toll-free telephone number (i. e., you get a message that states that the number is out of order or out of service) the survivor or CAO should call SSA's national 800 number (**1-800-772-1213**) and tell the phone agent that you are filing for survivors benefits under the Military Service Casualties procedure and ask the phone agent to transfer you to the Philadelphia ICTU special toll-free number (**1-866-777-7887**). The phone agent will ask for certain identifying information to help facilitate the transfer of the call.
- If SSA's national 800 number phone agent has difficulty transferring the call to the Philadelphia ICTU the phone agent will follow the after 4:00 P.M. Eastern Time procedure (outlined above) and fax the lead to the Philadelphia ICTU at **215-597-5222**. The phone agent will ask for certain identifying information to help facilitate the transfer of the call. The Philadelphia ICTU may be able to call the survivor back the same day.

Application and Documentary Evidence

- To notify us of the death, the DD-1300 should be faxed to **215-597-5200**, ATTN: Pat Ferraro. On the cover sheet indicate "Military Service Casualty". Or, use the cover sheet provided. If there is a problem sending faxes to the above number then send the fax to **215-597-0857**.
- The DD-1300 information will be annotated to SSA's Death Master File which will prevent fraudulent or inappropriate use of the Social Security Number (i. e., identify theft).
- However, should we be contacted before the DD-1300 is received, we can still start the claims process with a verbal report of death from the CAO, including where the death occurred, and we can begin to take the claim immediately.
- When you contact our special 800 number, the Philadelphia ICTU Claims Taker will ask the survivor certain questions in order to complete an application for benefits.
- The Philadelphia ICTU will immediately process the application for payment unless one of the exceptions below exists. The ICTU has been given the authority to initially sign the application to expedite payment. However, a signed application will still be required from the applicant after we process the claim.
- The CAO or survivor will be given a different toll free 800 number (**1-866-777-9648**) if they need to call us back with additional information or contact us again if they have a question.
- Once the application has been processed for payment, the Philadelphia ICTU will send out a claims package to the survivor that includes the application(s) for signature, a cover letter detailing what documentary evidence is required, and how to send it to us.
- The documentary evidence to be submitted may include:
 - proof of birth (e. g., birth certificate);
 - proof of relationship to the deceased (e. g., for a widow or widower - a marriage certificate);
 - proof of school attendance for a child age 18 to 19 who is attending a elementary/secondary school full time;
 - the SSN for any survivor where it was not provided when the application was taken;
 - proof of 1/2 support for any parent filing for benefits.

When A Claim Will Not Be Paid Immediately

- Any claim for survivor benefits which is for a child born out of wedlock can not be paid immediately. We must fully develop the relationship of the deceased and the child before the claim can be paid.

Follow-ups For Application(s) and/or Documentary Evidence

- If the signed application(s) and/or required evidence/information have not been received within 90 days of when the application was taken, we will follow up with the CAO by telephone (or with the survivor by mail if no CAO was involved).
- After 30 days from the first follow-up if the application(s) and/or required evidence/information still has not been received, a second follow-up will be made to the survivor by mail (with a cc: to the CAO, if one was involved). This second

follow-up will advise that benefits will be suspended in 30 days unless the application(s) and/or evidence is received before that date. The suspension would not occur until 150 days after the initial application was filed. If the CAO or applicant is having difficulty obtaining necessary evidence, they should contact us at **1-866-777-9648** for assistance and to request more time.

Disabled Widow and Childhood Disability Benefits

- Because of the nature of and requirements for Disabled Widow(er) Benefits and Childhood Disability Benefits, the local Social Security offices exclusively handle these types of claims. The Philadelphia ICTU will process any non-disability survivor claims and establish an appointment at the local Social Security office for those who have to file a disability claim.

In order to be found disabled, the disabled widow(er) and disabled children must have a disability that is expected to last at least 12 months or result in death. In addition, a disabled widow(er) must serve a five-month waiting period from the date of disability onset.

SSA Points of Contacts (POC) For Chief Casualty Officers

Primary POC – Expedited Claims Process

- Pat Ferraro
Chief, Operations Support Branch
Telephone Number – 215-597-5306 or 215-597-2306*
Fax Number – 215-597-5200
E-Mail – patricia.ferraro@ssa.gov

Back-up POC – Expedited Claims Process

- John Graziani
Operations Analysis Section Team Leader
Telephone Number – 215-597-3552 or 215-597-1084*
Fax Number – 215-597-5200
E-Mail – john.graziani@ssa.gov

Any questions on our policies or other issues may be referred to:

- Evelyn Lewis
Executive Officer
Telephone Number – 215-597-5157 or 215-597-2484*
Fax Number – 215-597-2827
E-Mail – evelyn.lewis@ssa.gov
- Terri Lewis
Center Director, Center For Program Support
Telephone Number – 215-597-0710*
Fax Number – 215-597-2989
E-Mail – terri.lewis@ssa.gov

*The asterisked phone numbers have voice mail capability. If you call after hours and/or wish to leave a voice mail message use those phone numbers with the asterisk.



FAX

TO: Pat Ferraro

FROM: _____

FAX: 215-597-5200
(BACK-UP FAX: 215-597-0857)

DATE: _____

PHONE: 215-597-5306
OR: 215-597-2306

PAGES: _____

MILITARY SERVICE CASUALTY

April 4, 2003