

Trust Management Services
P.O. Box 879
Santa Barbara, CA 93102

INDEPENDENT LIVING INTAKE PACKET

Dear Service Coordinator,

Attached you will find our 4 page intake form and the required releases. Please follow the instructions carefully. After you have completed the intake forms and gathered the required signatures, all of the documents should be mailed to the address above. We **MUST HAVE** the original signatures - faxes will not work. Once we have received the required paperwork and find it to be complete we will submit a change of payee application to Social Security.

Authorization for Payeeship: Please use ink when completing this form. Complete both the persons served name SSN and SSA Claim number in the top right corner. (The SSA claim number is the number under which the persons served is receiving SSA benefits) If the persons served signs with X or mark there must be 2 witnesses signature at the bottom portion of this form.

TMS - Consent to Exchange Information: Please use ink when completing this form. This form was developed so we can obtain and exchange information about the persons served for the purposes of either acting as the payee or paying their bills, Please fill in the persons served name, Social Security Number and date of birth at the top of this form. Review this form with the person served explaining all types of information we may ask for and with whom it may be shared. If the persons served objects to any you should place a line through that particular item(s). Have the persons served sign and date the form. If the persons served signs with an X or mark 2 witnesses' signatures are required at the bottom of this form.

Authorization for Social Security to Obtain Personal Information: This is a Social Security form and is requested upon intake. Please enter persons served name and SSN on the first line. Have persons served sign the middle section by the arrow. If the persons served signs with an X or mark 2 witnesses' signatures are required at the bottom of this form.

Budget Worksheet: This page is used to tells us who to pay, where to mail payment and how often money is sent. We run checks each working day. We are closed all federal holidays. We will also be closed the last working day of the month to review the next month budgets. If your persons served wants money sent to them on a particular day of the month and that day falls on a weekend or holiday the check will be send out the working day before.

Please complete the persons served name and SSN as well as the SSA claim number if persons served is receiving SSA. When working on a budget for a persons served, you need to know how much money the persons served gets each month. Next you should write the amounts received in the income section. Now it is time to tell us what there bills are. Rent, Utilities, Food, etc. For food and personal spending, please advise both how often your persons served would like these funds mailed (weekly, biweekly, monthly, semi-monthly or on a specific day of the month).

When figuring out the amounts for food and personal spending, please calculate based on a 5 week month - we don't want to run short! **Make sure that total monthly expenses do not exceed total monthly income received.**

The persons served, with help from there ILS or SLS agency, should contact any utility company you have indicated on this form and request the mailing address of their bill be changed to our address **PO Box 879, Santa Barbara, CA 93102**. The support agency should remind the persons served that if they continue to receive their bill this means TMS is not and they should again contact the utility company to request a change of address.

TMS Board and Care Intake Form: This is a 4 page form requesting biographical information about your persons served. Please send copies of requested documents when instructed. Please fill in all areas. If any area does not apply, draw a line through it and write N/A.

After all forms have been completed they should be mailed to TMS at the address above.

If you have any questions feel free to contact your staff at TMS

Stacie Landess

E-mail Stacie@trustmgmtservices.com

Erin Gonzalez

E-mail Erin@trustmgmtservices.com

Current phone numbers can be found on our Web site.
Visit us at www.trustmgmtservices.com

**Authorization for Payeeship
Advance Notification of Representative Payment**

Client Name _____

SSN _____

SSA Claim # _____

AUTHORIZATION FOR PAYEESHIP

I _____ hereby authorize Trust Management Services (TMS) to file an application for payeeship and to become payee for any SSA/SSA benefits I may be eligible to receive. I understand these benefits will be administered by Trust Management Services.

I hereby consent and authorize Trust Management Services and the Social Security Administration to disclose benefits eligibility payment information about me for use in applying for any Social Security Benefits, Supplemental Security Benefits, Railroad benefits, Veterans benefits, Civil Service Annuity benefits, and Black Lung benefits I may be eligible to receive as well as for planing and providing services for me. This authorization will remain in effect for the duration of time for which Trust Management Services is my representative payee.

NEED FOR REPRESENTATIVE PAYEE

The Social Security Administration (SSA) had decided that I need someone to manage my benefits. Because of this, SSA will send my benefits to a representative payee. It is the duty of the representative payee to use my benefits for my best interest.

CHOICE OF REPRESENTATIVE PAYEE

SSA has selected Trust Management Services to be my representative payee.

MY RIGHT TO APPEAL

I have the right to appeal SSA's decision. I can appeal the choice of who will be the representative payee. In most cases, I also have the right to appeal the decision that I need a payee. If I appeal, I will have the right to review the evidence in the file and submit new evidence.

I understand that I must file an appeal within 60 days. If I file after the 60 day period, I must have a good reason for not having filed this appeal on time. I have to ask for the appeal in writing. I will contact an SSA office if I wish to appeal.

Client Signature _____

Date _____

Legal Representative Signature _____

Date _____

Witnesses are required only if this statement has been signed by a (X) above. If signed by mark (X), two witnesses to the signing who know the person making the statement must sign below, giving their full address.

1.) Signature of Witness

2.) Signature of Witness

Address (Number and Street, City, State, Zip Code)

Address (Number and Street, City, State, Zip Code)

Trust Management Services

P.O. Box 879 Santa Barbara, CA 93102

Consent to Exchange Information

I, the Persons Served/Parent/Guardian or Conservator of:

Persons Served Name: _____

SSN: _____

Date of Birth: _____

Authorized TMS, and it's employees to obtain the following type of information/records:

<input type="checkbox"/> Educational	<input type="checkbox"/> Social	<input type="checkbox"/> Wages information
<input type="checkbox"/> Medical/Dental	<input type="checkbox"/> Vocational	<input type="checkbox"/> Psychological
<input type="checkbox"/> Individual Program Plan	<input type="checkbox"/> Utility Bills	<input type="checkbox"/> Other (Specify)

This information shall be used for the purposes indicated below:

<input type="checkbox"/> Social Security Eligibility	<input type="checkbox"/> Paying my bills
<input type="checkbox"/> Social Security Re-determination	<input type="checkbox"/> Social Security CDR
<input type="checkbox"/> Other (Specify) _____	

This authorization shall be valid for a period of one year from the date signed or until _____
revoked in writing.

Persons Served Signer: _____

Date: _____

Witnesses are required only if this statement has been signed by a (X) above. If signed by mark (X), two witnesses to the signing who know the person making the statement must sign below, giving their full address.

1.) Signature of Witness

2.) Signature of Witness


Address (Number and Street, City, State, Zip)

Address (Number and Street, City, State, Zip)

**AUTHORIZATION FOR THE SOCIAL SECURITY ADMINISTRATION
TO OBTAIN PERSONAL INFORMATION**

Authorizing Person (Person about whom information is being requested)	Social Security Number
Claimant/Beneficiary (If other than authorizing person)	Claimant's/Beneficiary's Social Security Number

I authorize any public or private custodian of records to disclose to the Social Security Administration any records or information about me. In the case of a minor or incapable person, I, as guardian or representative, authorize the same disclosure of records about the person I represent.

Authorizing Person's Signature SIGN HERE 		
Mailing Address	City and State	ZIP Code

Your authorization does not ordinarily have to be witnessed. However, if you have signed by mark (X), two witnesses to the signing who know you must sign below giving their full addresses.

1. Signature of Witness	2. Signature of Witness
Address (Number, Street, City, State, ZIP Code)	Address (Number, Street, City, State, ZIP Code)

TMS Independent Living Payee Intake Form

First Name _____ Last Name _____ Mi _____

SSN: _____

SSA Claim #: _____ - _____

UCI#: _____

Sex: _____ DOB: _____ Place of Birth _____ State _____

Legally blind?: (Yes / No) (Circle One) Deaf?: (Yes / No) (Circle One)

Is persons served conserved? (Yes / No) Circle One

If persons served is conserved, please attach copy of conservatorship papers and fill in below:

Name _____ Phone: (_____) _____ - _____

Living Arrangements

Address: _____

City: _____ St: _____ Zip: _____

Phone: (_____) _____ - _____

Description of Living Arrangements

(Check one)

____ Alone in own apt/home

____ Sharing apt/home with roommates

____ Paid roommate in home (How much rent does paid roommate pay? \$ _____)

Date Moved In: _____

(mo/yr)

Landlord name: _____

City: _____ St: _____ Zip: _____

Phone: (_____) _____ - _____

Roommate Information

1st Roommate Name: _____ DOB or SSN: _____

Is roommate on SSI? (Yes / No) (Circle One) Is roommate paid roommate? (Yes / No) (Circle One)

2nd Roommate Name: _____ DOB or SSN: _____

Is roommate on SSI? (Yes / No) (Circle One) Is roommate paid roommate? (Yes / No) (Circle One)

#3 Roommate Name: _____ DOB or SSN: _____

Is roommate on SSI? (Yes / No) (Circle One) Is roommate paid roommate? (Yes / No) (Circle One)

If additional space is required, use back of page

Employment Information

Employer Name: _____ Date Started Working _____

Employer Mailing Address: _____

City: _____ St: _____ Zip: _____

Phone: (_____) _____ - _____ Fax: (_____) _____ - _____

Contact Name: _____

How often paid: Weekly / Every 2 Weeks / Twice a Month / Monthly / Piece Work (Circle One)

Last Date Paid: _____ (mo/day/year)

Paid by the: Hour / Piece (Circle One)

Rate of Pay: \$ _____ Average Check \$ _____

Resources: Cash on Hand

Cash on Hand \$ _____ as of _____ (mo/day/yr)

Resources: Checking Account

Bank Name: _____

Acct. # _____ Balance \$ _____ as of date _____

Interest Bearing: Monthly / Quarterly / None (circle one)

Please attach copy of current bank statement

Resources: Savings Account

Bank Name: _____

Acct. # _____ Balance \$ _____ as of date _____

Interest Bearing: Monthly / Quarterly / None (circle one)

Please attach copy of current bank statement

Resources: Special Needs Trust

Trustee Name _____

Address: _____

City: _____ St: _____ Zip: _____

Phone: (____) _____ - _____

Please attach copy of Trust Document

Resources: Burial Account

Where: _____

Amount/Balance \$ _____ Revocable / Irrevocable (circle one)

Address: _____

City: _____ St: _____ Zip: _____

Phone: (____) _____ - _____ **Please attach copy of Burial Document**

ILS / SLS Agency Involved with Consumer

Agency Name: _____

Support Staff's Name: _____

Address: _____

City: _____ St: _____ Zip: _____

Phone: (____) _____ - _____ Fax: (____) _____ - _____

Email: _____

Service Coordinator Involved with Consumer

Name: _____

Office Location: _____

Address: _____

City: _____ St: _____ Zip: _____

Phone: (____) _____ - _____ Fax: (____) _____ - _____

Email: _____

BUDGET SHEET

Persons Served Name: _____
 SSN: _____
 SSA Claim #: _____

Income :

SSI \$ _____
 SSA \$ _____
 Other \$ _____

Benefit Name and Claim number

Total Income \$ _____

Expenses:	Amount	Who is paid, Address & Phone #	Detailed Description: Inculde account #
Rent			
Utilities Gas			
Utilities Electric			
Utilities Phone			
Utilities Cable TV			
Food			
Personal Spending			
Other			
Other			

Total Expenses _____