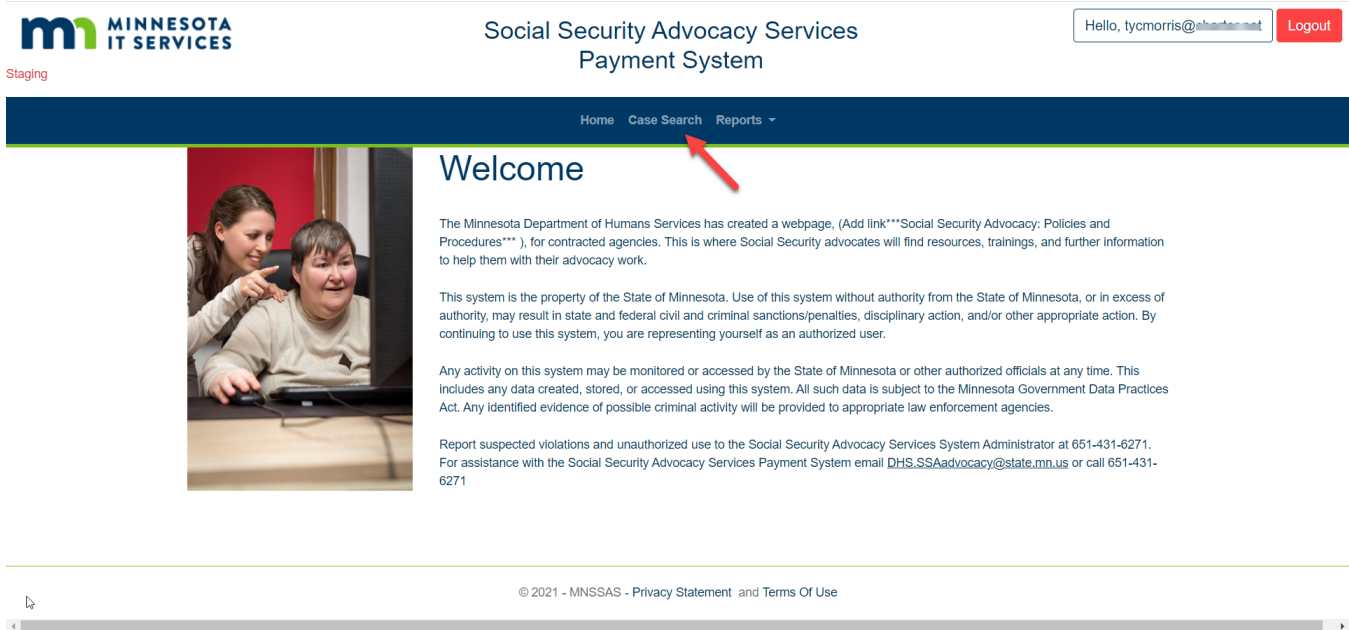


## Closing a case in the Social Security Advocacy Services Payment System

All users of the Social Security Advocacy Services (SSAS) Payment System have the ability to close a client’s case at any time, as long as an invoice has not been submitted to DHS for payment (Note: once an invoice has been submitted to DHS for payment, the SSAS system does not allow users to close a case.) Examples of when you should close a client’s case include when the Social Security Administration denies your client’s claim and you do not help the client appeal, when a client becomes incarcerated, when a client changes grantees or is no longer homeless or at risk for homelessness, etc.

### To close a client’s case, follow these steps:

After logging into the SSAS payment system, click on the Case Search link on the blue toolbar.



Search for a client's case by entering the client's SSN and clicking the Submit button.

The screenshot shows the 'Case Search' page of the Social Security Advocacy Services Payment System. The header includes the Minnesota IT Services logo, the system name, and a user login 'Hello, tycorris@... Logout'. The search form contains the following fields: Provider (NEW Star Ship Services), Client SSN (Enter Client SSN), Client Last Name (Enter Client's Last Name), Case Status (Please select one), and Invoice Number (Enter Invoice Number). A 'Show SSN' checkbox is also present. Below the form are buttons for 'Submit', 'Cancel', and 'Add New Case'. A table below the form lists search results:

Invoice Number	First Name	Last Name	Date Created	Provider	Case Status	Invoice Status	Edit
25	Kim	Kime	9/10/2021	NEW Star Ship Services	Closed	Paid (FOD Only)	Edit
26	Harold	Joe	9/10/2021	NEW Star Ship Services	Closed	Paid (FOD Only)	Edit
27	larry	berry	9/10/2021	NEW Star Ship Services	Closed	Paid (FOD Only)	Edit

Click Edit to close the client's case.

The screenshot shows the 'Case Search' page with the search criteria updated. The Client SSN field is now populated with '1320'. The search results table is as follows:

Invoice Number	First Name	Last Name	Date Created	Provider	Case Status	Invoice Status	Edit
1320	Joe	Woods	5/2/2022	NEW Star Ship Services	Open	Created (System Only)	Edit

Below the table is a pagination control showing page 1 of 10. A red arrow points to the 'Edit' button for the case with invoice number 1320.

Click the Case Close link.

Staging

MINNESOTA IT SERVICES

Social Security Advocacy Services Payment System

Hello, tycmorris Logout

Home Case Search Reports

### Case Information

Case Information / SSA Application Information / Invoice Submit / Case Close

Client SSN: \*\*\*\*\*

Show SSN

---

First Name: Joe Middle Initial: R Last Name: Woods

DOB: 05/01/1972 Provider: NEW Star Ship Services

Upload Client's SSA-1696: Choose file Browse

Date you completed screening and determined client qualified for DHS Social Security Advocacy Services: 01/25/2022

Case Created By: Tod Norris

Date Case Created:

Select a Case Close Reason from the drop down. (Note: only one reason can be selected.)

Home Case Search Reports

### Case Close

Case Information / SSA Application Information / Invoice Submit / Case Close

Client SSN: \*\*\*\*\* Client First Name: Joe Client Last Name: Woods

Show SSN

---

Invoice Number: 1320

Case Close Reason: Please select one

Case Close Other Reason:

Case Closed By:

Date Case Closed: mm/dd/yyyy

Submit Cancel

Click Submit.

Show SSN

Invoice Number:

1320

Case Close Reason:

SSI/RSDI denied

Case Close Other Reason:

Case Closed By:

Date Case Closed:

mm/dd/yyyy

Submit

Cancel

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The Case Search page will be displayed, users will see a confirmation message in a green box showing “This case was successfully closed.”

✓ This case was successfully closed.

Social Security Advocacy Services  
Payment System

Hello, tycmorris@... Logout

Home Case Search Reports

### Case Search

Provider: Client SSN: Client Last Name:

NEW Star Ship Services Enter Client SSN Enter Client's Last Name

Show SSN

Case Status: Invoice Number:

Please select one: Enter Invoice Number

Submit Cancel Add New Case

If you select “Other Reason” the SSAS system allows users to enter text in the Case Close Other Reason box to explain the reason the case was closed. Click Submit when finished.

Show SSN

Invoice Number:

1320

Case Close Reason:

Other Reason

Case Close Other Reason:

Text input field for Case Close Other Reason.

Case Closed By:

Text input field for Case Closed By.

Date Case Closed:

mm/dd/yyyy

Submit

Cancel

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If you have additional questions, please contact the SSAS system administrator Ty Morris at: [ty.morris@state.mn.us](mailto:ty.morris@state.mn.us) or call 651-431-6271.