

NOTICE OF FORM CHANGE NO. 03-023

DATE

3/6/03

TO:County Welfare Director
Supply Clerk / Forms Coordinator**FROM:**Forms Management Unit
(916) 657-1907 Community Care Licensing District Offices District Attorney Private and Public Adoption Agencies Other

Listed below is information regarding a form change. Only applicable information is shown.

This notice updates your Department of Social Services County Forms Catalog.

FORM NUMBER AND TITLE

SOC 310 (1/03) Statement Of Facts For In-Home Supportive Services

ORDER UNIT SET	<input type="checkbox"/> Free <input checked="" type="checkbox"/> Sold	ESTIMATED PRICE 7 cents	INITIAL SUPPLY SENT <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<input type="checkbox"/> New <input checked="" type="checkbox"/> Revised	DATE OF FORM 1/03	REPLACES 8/00	<input type="checkbox"/> Obsolete
REQUIRED FORM- <input checked="" type="checkbox"/> No Change Permitted	REQUIRED FORM- <input type="checkbox"/> Substitute Permitted With Prior DSS Approval	<input type="checkbox"/> Recommended Form	
UNLESS OTHERWISE SPECIFIED STOCK MAINTAINED AT: Department of Social Services Warehouse P.O. Box 980788 West Sacramento, CA 95798-0788		<input type="checkbox"/> OTHER:	

FORMS DISPOSITION AND SPECIAL INSTRUCTIONS

DISPOSITION OF OLD SUPPLY

 Use until exhausted Destroy

USE NEW FORM

 When supply available in DSS Warehouse Use new form effective when supply of 8/00 revision is exhausted.

USE FORM IN ACCORDANCE WITH

 All County Letter No. Other (specify)

ADDITIONAL INFORMATION REGARDING FORM CHANGE

Attached are a Reproducible Copies

The attached 1/03 revision contains a minor correction to the SOC 310. Items 6 and 9 have been corrected to refer to the additional space in paragraph/Item 21 instead of 20. The CDSS warehouse will continue to issue the 8/00 version of this form until their stock is exhausted, at which time the 1/03 revision will be printed.

Check on the Internet to see if forms are available at www.dss.cahwnet.gov.

For camera-ready copies of English and Spanish forms, please call the Forms Management Unit (FMU) at (916) 657-1907, or by electronic mail at: fmudss@dss.ca.gov. Contact Language Services for other languages at (916) 445-6778 or by electronic mail at LTS@dss.ca.gov.

STATEMENT OF FACTS FOR IN-HOME SUPPORTIVE SERVICES

Note: Your eligibility for In-Home Supportive Services (IHSS), under Welfare and Institutions Code Section 12300, will be determined by the information you provide on this form.

1. APPLICANT INFORMATION		FOR COUNTY USE ONLY
NAME (FIRST, MIDDLE, LAST)		BIRTHDATE
HOME ADDRESS	CITY	ZIP CODE
MAILING ADDRESS (IF DIFFERENT)	HOME PHONE ()	MESSAGE PHONE ()
PLACE OF BIRTH	SOCIAL SECURITY NUMBER	MEDI-CAL CARD NUMBER
ARE YOU: <input type="checkbox"/> AGE 65 OR OVER? <input type="checkbox"/> DISABLED? <input type="checkbox"/> BLIND?		
MARITAL STATUS: <input type="checkbox"/> MARRIED <input type="checkbox"/> SEPARATED <input type="checkbox"/> WIDOWED <input type="checkbox"/> DIVORCED		
<input type="checkbox"/> SINGLE (Date / /) (Date / /) (Date / /) (Date / /)		
COMPLETE THE FOLLOWING:		
NAME OF SPOUSE OR PARENT(S) (IF YOU ARE UNDER 18 YEARS OF AGE)		
IS SPOUSE/PARENT(S): <input type="checkbox"/> AGE 65 OR OVER? <input type="checkbox"/> DISABLED? <input type="checkbox"/> BLIND?		
SPOUSE/PARENT(S) SOC. SEC. NO.	SPOUSE/PARENT(S) ADDRESS (IF DIFFERENT THAN APPLICANT'S)	
2. DO YOU RESIDE IN CALIFORNIA WITH THE INTENTION TO CONTINUE RESIDING HERE? <input type="checkbox"/> YES <input type="checkbox"/> NO		
3. ARE YOU A CITIZEN OF THE UNITED STATES? (IF "YES", GO TO "ITEM 4") <input type="checkbox"/> YES <input type="checkbox"/> NO		
(A.) IF YOU ARE NOT A UNITED STATES CITIZEN, ARE YOU LAWFULLY ADMITTED TO PERMANENT RESIDENCE OR LEGALLY PERMITTED TO REMAIN IN THE U.S.? <input type="checkbox"/> YES <input type="checkbox"/> NO		
(B.) WHAT IS YOUR ALIEN REGISTRATION NUMBER?		
(C.) WHAT IS NAME OF SPONSOR?		
(D.) WHAT IS SPONSOR'S ADDRESS?		
4. WHAT IS YOUR LIVING ARRANGEMENT?		
MY HOME IS A: <input type="checkbox"/> HOUSE <input type="checkbox"/> APARTMENT <input type="checkbox"/> ROOM <input type="checkbox"/> ROOM & BOARD <input type="checkbox"/> TRAILER/ MOTOR HOME <input type="checkbox"/> OTHER		
IN WHICH I: <input type="checkbox"/> OWN/ AM BUYING <input type="checkbox"/> RENT <input type="checkbox"/> LIVE COST FREE <input type="checkbox"/> RECEIVE BOARD AND CARE		
LANDLORD'S NAME	AMOUNT OF RENT, BOARD AND/OR MORTGAGE PAID \$ _____/MONTH	
ADDRESS	CITY	ZIP CODE
5. ARE THERE OTHERS LIVING IN THE HOUSEHOLD? (IF "YES", GIVE THE INFORMATION BELOW:) <input type="checkbox"/> YES <input type="checkbox"/> NO		
NAME	RELATIONSHIP	AGE

6. DO YOU, YOUR SPOUSE OR YOUR PARENT(S) OWN REAL PROPERTY OTHER THAN YOUR HOME?
 (If "YES", GIVE THE INFORMATION BELOW: OR ON PAGE 4 PARAGRAPH 21.) YES NO

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ADDRESS		CITY	COUNTY
STATE	ZIP CODE	PARCEL NUMBER	
ASSESSED VALUE \$	TOTAL AMOUNT OWED ON MORTGAGE(S) \$	MONTHLY PAYMENT \$	
ANNUAL TAXES \$	ANNUAL INSURANCE \$	ANNUAL ASSESSMENTS \$	
HOW IS PROPERTY UTILIZED?	IF USED AS RENTAL, INDICATE AMOUNT OF RENT.	ARE TAXES INCLUDED IN THE MONTHLY PAYMENT?	<input type="checkbox"/> YES <input type="checkbox"/> NO
OTHER PROPERTY EXPENSES		IS INSURANCE INCLUDED IN THE MONTHLY PAYMENT?	<input type="checkbox"/> YES <input type="checkbox"/> NO

7. DO YOU, YOUR SPOUSE OR YOUR PARENT(S) OWN MOTOR VEHICLES (CARS, TRUCKS, MOTORCYCLES, BOATS, MOTORHOMES)?
 (IF "YES", GIVE THE INFORMATION BELOW:) YES NO

MAKE AND MODEL	YEAR	ESTIMATED VALUE	CHECK IF USED FOR		MODIFIED FOR DISABLED PERSON?
			WORK	MEDICAL TRANS.	

8. WHAT IS THE VALUE OF YOUR LIQUID RESOURCES?
 (IF APPLICANT IS A BLIND OR DISABLED CHILD UNDER AGE 18, INCLUDE RESOURCES OF PARENT(S) RESPONSIBLE FOR CHILD. INDICATE IF ANY RESOURCE IS EXCLUSIVELY FOR BURIAL EXPENSES FOR YOU OR YOUR IMMEDIATE FAMILY.)

LIQUID RESOURCES	(✓) IF NONE	ENTER VALUE UNDER OWNER			(✓) FOR BURIAL
		SELF	SPOUSE/PARENTS	JOINTLY	
CASH ON HAND AND/OR MONEY KEPT IN THE HOME		\$	\$	\$	
CHECKING ACCOUNT		\$	\$	\$	
SAVINGS ACCOUNT, CREDIT UNION TRUST FUNDS		\$	\$	\$	
CHECKS OR CASH IN SAFETY DEPOSIT BOX		\$	\$	\$	
STOCKS, BONDS, OR MUTUAL FUNDS NOTES, MORTGAGES, DEEDS		\$	\$	\$	
IRA, CERTIFICATES OF DEPOSIT, MONEY MARKET		\$	\$	\$	
OTHER (SPECIFY):		\$	\$	\$	

9. DO YOU, YOUR SPOUSE OR PARENT(S) (IF APPLICANT IS UNDER 18) HAVE ANY PERSONAL GOODS OR HOUSEHOLD EFFECTS WITH A COMBINED EQUITY VALUE OF MORE THAN \$2,000?
 (E. G., HOUSEHOLD FURNISHINGS, CLOTHING, AND JEWELRY.) (IF ADDITIONAL SPACE IS NEEDED, SPECIFY IN ITEM 21.) (IF "YES", GIVE INFORMATION BELOW:) (EXCLUDE REHABILITATION DEVICES AND EQUIPMENT.) YES NO

DESCRIPTION	CURRENT MARKET VALUE	AMOUNT OWED
A.	\$	\$
B.	\$	\$
C.	\$	\$

10. DO YOU, YOUR SPOUSE OR YOUR PARENT(S) HAVE ANY LIFE INSURANCE?
 (IF "YES", GIVE THE INFORMATION BELOW:) YES NO

NAME OF OWNER	NAME OF INSURED	NAME AND ADDRESS OF INSURANCE COMPANY		
POLICY NUMBER	TOTAL FACE VALUE OF POLICY	CASH SURRENDER VALUE	WHEN WAS THE POLICY PURCHASED	IF THERE IS A LOAN AGAINST THE POLICY WHAT IS THE AMOUNT

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11. DO YOU, YOUR SPOUSE OR YOUR PARENT(S) HAVE ANY BURIAL FUNDS, INSURANCE, TRUSTS, SPACES OR CONTRACTS? (IF "YES", GIVE THE INFORMATION BELOW:) YES NO

OWNER OF EACH ITEM	NAME OF EACH ITEM	TOTAL PURCHASE VALUE OF EACH ITEM	HOW MUCH IS OWED ON EACH ITEM	NAME AND ADDRESS OF COMPANY/SOURCE
			\$	
			\$	

12. HAVE YOU, YOUR SPOUSE OR PARENT(S) (IF A MINOR IS APPLYING) SOLD, TRANSFERRED OR GIVEN AWAY ANY PROPERTY, INCLUDING MONEY, IN THE LAST 36 MONTHS? (IF "YES", GIVE THE INFORMATION BELOW:) YES NO

DESCRIPTION	DATE OF TRANSFER	ESTIMATED VALUE	AMOUNT RECEIVED
		\$	\$
		\$	\$

13. ARE YOU OR YOUR SPOUSE EMPLOYED OR SELF—EMPLOYED? (IF "YES", GIVE THE INFORMATION BELOW;) (IF APPLICANT IS A BLIND OR DISABLED CHILD UNDER 18 INCLUDE EMPLOYMENT OF PARENT(S).) YES NO

NAME OF EMPLOYER		ADDRESS OF EMPLOYER	
OCCUPATION	GROSS SALARY PER PAY PERIOD	HOW OFTEN PAID?	
	\$		

IF SELF-EMPLOYED, ATTACH VERIFICATION OF ALL ORDINARY AND NECESSARY BUSINESS EXPENSES, PRINCIPAL PAYMENTS OR ENCUMBRANCES AND PERSONAL INCOME TAX.

14. DO YOU, YOUR SPOUSE OR YOUR PARENT(S) HAVE ANY BUSINESS EQUIPMENT INVENTORY, OR MATERIAL? (IF "YES", GIVE THE INFORMATION BELOW:) YES NO

DESCRIPTION	PURPOSE	ESTIMATED VALUE	AMOUNT OWED
		\$	\$
		\$	\$

15. IF YOU ARE BLIND OR DISABLED AND WORKING, DO YOU HAVE ANY WORK—RELATED EXPENSES DUE TO BLINDNESS OR DISABILITY? (IF "YES", GIVE THE INFORMATION BELOW:) YES NO

COST OF TRANSPORTATION TO AND FROM WORK	COST OF ITEMS OR SERVICES TO PREPARE FOR WORK	COST OF ITEMS OR SERVICES NEEDED FOR JOB PERFORMANCE
\$	\$	\$

16. LIST INCOME RECEIVED EACH MONTH FROM SOURCES OTHER THAN EMPLOYMENT. IF APPLICANT IS A BLIND OR DISABLED CHILD UNDER AGE 18, INCLUDE INCOME OF PARENT(S) RESPONSIBLE FOR CHILD.

TYPE OF INCOME	(✓) NONE	ENTER MONTHLY AMOUNT RECEIVED BY:		CLAIM NUMBER
		SELF	SPOUSE/PARENT(S)	
A. SOCIAL SECURITY (RETIREMENT, SURVIVOR, DISABILITY INSURANCE)		\$	\$	
B. CASH CONTRIBUTIONS		\$	\$	
C. STATE DISABILITY/ UNEMPLOYMENT INSURANCE		\$	\$	
D. VETERAN'S PENSION/COMPENSATION		\$	\$	
E. V.A. AID AND ATTENDANCE CARE/ HOUSEBOUND ALLOWANCE		\$	\$	
F. GOVERNMENT PENSION		\$	\$	
G. PRIVATE AND/OR MILITARY RETIREMENT PENSION		\$	\$	
H. ALIMONY, CHILD SUPPORT		\$	\$	
I. RENTAL INCOME		\$	\$	
J. INTEREST, DIVIDENDS, ROYALTIES		\$	\$	
K. RAILROAD RETIREMENT PENSION		\$	\$	
L. WORKER'S COMPENSATION		\$	\$	
M. AFDC PAYMENTS		\$	\$	
N. OTHER: (SPECIFY)		\$	\$	

17. HAVE YOU, YOUR SPOUSE OR YOUR PARENT(S) APPLIED FOR OR DO YOU EXPECT TO START RECEIVING INCOME FROM ANY OF THE SOURCES LISTED IN "ITEM 16"? YES NO
 (IF "YES", GIVE THE INFORMATION BELOW:)

TYPE OF INCOME	PLACE APPLIED	DATE APPLIED	DATE EXPECTED

18. HAVE YOU, YOUR SPOUSE OR YOUR PARENTS HAD MEDICAL EXPENSES WITHIN THE LAST 3 MONTHS AND WANT MEDI-CAL FOR THOSE EXPENSES? YES NO

19. (A.) DO YOU, YOUR SPOUSE OR YOUR PARENT(S) RECEIVE ANY NON-CASH GIFTS OR CONTRIBUTIONS OF RENT, FOOD, CLOTHING OR OTHER ITEMS OF NEED? YES NO
 (B.) DO YOU, YOUR SPOUSE OR YOUR PARENT(S) RECEIVE NON-CASH COMPENSATION IN RETURN FOR WORK? YES NO
 (IF "YES" TO "(A)" OR "(B)", GIVE THE INFORMATION BELOW:)

ITEM CONTRIBUTED	FREQUENCY OF RECEIPT	CASH EQUIVALENT
		\$
		\$

20. DO YOU, YOUR SPOUSE OR YOUR PARENT(S) HAVE HEALTH OR HOSPITALIZATION INSURANCE (INCLUDING PAID BY AN EMPLOYER)? YES NO
 (IF "YES", GIVE THE INFORMATION BELOW:)

INSURANCE CARRIER (CHECK APPLICABLE(S))	PERSON(S) INSURED
<input type="checkbox"/> MEDICARE (CLAIM NO. _____)	
<input type="checkbox"/> CHAMPUS	
<input type="checkbox"/> VETERAN'S ADMINISTRATION COVERAGE	
<input type="checkbox"/> KAISER	
<input type="checkbox"/> ROSS—LOOS	
<input type="checkbox"/> BLUE SHIELD	
<input type="checkbox"/> BLUE CROSS	
<input type="checkbox"/> PREPAID HEALTH PLAN	
<input type="checkbox"/> HEALTH MAINTENANCE ORGANIZATION (SPECIFY: _____)	
<input type="checkbox"/> OTHER CARRIER (SPECIFY: _____)	

21. ITEM NUMBER	ADDITIONAL INFORMATION (ATTACH ADDITIONAL SHEETS IF NECESSARY)

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EXPECTED INCOME
 How Verified:
 a. _____
 b. _____
 c. _____

IN-KIND INCOME
 30-775.11
 How Verified: _____

PREMIUM PAYMENTS
 Amount Paid: \$ _____
 How often: _____
 How Verified: _____

SOC 310 VERIFICATION
 ELIGIBLE INELIGIBLE
 REASON (IF INELIGIBLE): _____
 SOCIAL SERVICE WORKER: _____
 DATE: _____

BE SURE YOU HAVE READ EVERY ITEM AND ANSWERED ALL THE QUESTIONS THAT APPLY TO YOU. READ THE FOLLOWING CAREFULLY BEFORE SIGNING:

I HEREBY STATE BY MY SIGNATURE THAT THE ANSWERS I HAVE GIVEN ARE CORRECT AND TRUE TO THE BEST OF MY KNOWLEDGE.

I AGREE TO TELL THE COUNTY DEPARTMENT OF SOCIAL SERVICES WITHIN 10 DAYS IF THERE ARE ANY CHANGES IN MY INCOME, POSSESSIONS, OR EXPENSES, OR IN THE NUMBER OF PERSONS IN MY HOUSEHOLD, OR IF ANY CHANGE OF ADDRESS. AND I AGREE TO MEET ALL OTHER RESPONSIBILITIES EXPLAINED IN THE "MEDI-CAL RESPONSIBILITIES CHECKLIST" I HAVE RECEIVED.

I UNDERSTAND THAT I MAY BE ASKED TO PROVE MY STATEMENTS, BUT THAT THE COUNTY IS REQUIRED BY LAW TO KEEP THEM CONFIDENTIAL.

I UNDERSTAND THAT IF I AM DISSATISFIED WITH ANY ACTIONS TAKEN BY THE COUNTY DEPARTMENT OF SOCIAL SERVICES, I HAVE THE RIGHT TO A STATE HEARING.

I UNDERSTAND THAT I MUST DISPOSE OF ANY EXCESS RESOURCES WITHIN A SIX-MONTH PERIOD IN THE CASE OF REAL PROPERTY AND WITHIN THREE MONTHS IN THE CASE OF PERSONAL PROPERTY AND REPAY ANY OVERPAYMENTS WITH THE PROCEEDS OF THE DISPOSED PROPERTY.

I UNDERSTAND THAT IF I AM ELIGIBLE FOR IHSS SERVICES, I WILL BE PROVIDED A MEDI-CAL CARD AT NO SHARE-OF-COST TO ME IF I PAY THE IHSS SHARE OF COST I AM OBLIGATED TO PAY.

I UNDERSTAND THAT FEDERAL AND STATE LAW REQUIRE THE RECOVERY OF ALL MEDI-CAL BENEFITS RECEIVED AFTER AGE 55 FROM THE ESTATE OF A MEDI-CAL BENEFICIARY IF THERE IS NO SURVIVING SPOUSE, MINOR CHILDREN, OR PERMANENTLY AND TOTALLY DISABLED CHILDREN.

I, THE UNDERSIGNED, DECLARE UNDER PENALTY OF PERJURY THAT THE FOREGOING STATEMENTS ARE TRUE AND CORRECT.

SIGNATURE OF APPLICANT	DATE	SIGNATURE OF WITNESS (REQUIRED IF APPLICANT SIGNED BY MARK)	DATE
SIGNATURE OF PERSON ACTING FOR APPLICANT (RELATIONSHIP: PARENT, GUARDIAN, CONSERVATOR)	DATE	SIGNATURE OF PERSON HELPING APPLICANT COMPLETE FORM	DATE