

Casework: Preparing to Open a Case

Frequently Asked Questions

Federal Agency Links

Determining what is casework

Opening a case

Once you have determined that your problem is one with which I can be of assistance, you should follow the steps listed below to gather necessary information and material before you contact my office. This will help my staff to assist you more efficiently.

STEP ONE: Complete a Personal Authorization Form

Because of the Right to Privacy Act, you will need to provide written permission before my office can request the status of your case with a federal agency. Please complete a Personal Authorization Form giving permission for my staff to look into the matter on your behalf.

STEP TWO: Gather necessary paperwork

- You must provide my staff with any background information you have regarding your case. This might include letters from the agency, medical forms, and other forms and documents relating to your problem.

- The agencies listed below require additional information. My staff will need this before they can make inquiries on your behalf:

- Office of Personnel Management Cases: the OPM uses your CSA or CSF number as well as your Social Security number and, for some cases your Date of Birth is helpful. To report the death of an annuitant and to apply for survivor benefits, you will need the death certificate.

- Immigration and Naturalization Cases: for these cases your A# is required to track your case.

- Workers' Comp Cases: your case number along with your Social Security Number will help us track your case.

