



Getting Started: Timeline for Completing an Initial SOAR SSI/SSDI Application



This guide is intended to help you complete a SOAR SSI/SSDI application in stages so that you aren't overwhelmed. The timeline allows you to focus enough time and energy on the medical summary report (MSR) while easily meeting the 60 days allowed. We encourage you to complete the process in less time as you are able.

Documents needed to complete the process:

- ✓ SOAR Checklist for Initial Claims (used as cover sheet of application package)
- ✓ SOAR Consent for Release of Information form
- ✓ SOAR Medical Summary Report (MSR) Worksheet
- ✓ Agency Release of Information
- ✓ SSA-827: Authorization to Disclose Information to SSA
- ✓ SSA-1696: Appointment of Representative
- ✓ SSA-16: Application for Social Security Disability Insurance (SSDI)
- ✓ SSA-8000: Application for Supplemental Security Income (SSI)
- ✓ SSA-3368: Adult Disability Report

TIMELINE FOR COMPLETING AN INITIAL SOAR APPLICATION	
Day One	<ul style="list-style-type: none">▪ Have applicant sign the <i>SOAR Consent for Release of Information</i> form and fax to the SSA SOAR Contact. This allows you to obtain the SSA status of the applicant. If the person is eligible to apply, this fax can also secure a protective filing date (if this has been agreed to by SSA).▪ The SSA SOAR contact should fax the <i>SOAR Consent for Release of Information</i> form back to you within 48 hours (or as agreed). Contact SSA or your SOAR State or Local Lead if you have not received this within 72 hours.▪ If your local SSA office does not accept the <i>SOAR Consent for Release of Information</i> form, call the SSA office <i>while with the applicant</i> to verify if the applicant has a pending case or appeal.
Day Two or Three	<ul style="list-style-type: none">▪ If the applicant does not have a pending case or active appeal, proceed with an initial application.▪ Have applicant sign both an <i>SSA-827 Authorization to Disclose Information to SSA</i> and an Agency Release of Information form for each hospital, clinic and/or doctors' office at which he/she remembers being treated. Mail or fax a signed SSA-827 and Agency Release to each treatment source within 24-48 hours of initiating the application process.▪ Contact the applicant's primary provider (psychiatrist/medical doctor) and inform his/her staff that you are assisting the applicant to apply for SSI/SSDI. Ask for their input and let them know you'll be requesting the physician's signature on a summary of how the applicant's illness and symptoms affect his/her ability to work.▪ Utilize the <i>Medical Summary Report (MSR) Worksheet</i> to begin writing the applicant's MSR. It is important to begin this report immediately so that you have the full 60 days to complete it.

Week 1-2

- Complete and have applicant sign an *SSA-1696 Appointment of Representative* form
- Meet with applicant 1-2 times per week to gather information for the *MSR Worksheet*; enter information into the appropriate sections on the *MSR* as you go.
- As you collect information about the applicant's medical treatment and work history, fill in the paper version of the *SSA-3368 Adult Disability Report*. You will transfer information from this paper form to the Online Disability Report when you are prepared to turn in the **completed application package**.
- Continue to work with applicant's primary provider to obtain additional information and get a commitment for a co-signature on the *MSR* (this allows it to be considered medical evidence).
- Continue collection of medical records. As you identify additional sources for medical information, send those providers a signed *SSA-827* and Agency Release. Work with treatment sources to identify ways to collect information quickly (e.g., pick up at their department, fax, etc.).

Weeks 3-4

- Complete and have applicant sign the *SSA-8000 Application for Supplemental Security Income*.
- Obtain any needed supportive documentation for the *SSA-8000* (e.g., bank statements, documentation of resources, etc.).
- Begin the online *Disability Benefit Application (also known as the SSA-16 Application for Social Security Disability Insurance)*. **Save information entered and do not submit until you are prepared to turn in the completed application package.** You can use the paper *SSA-16* as a worksheet for the online application.
- Continue to follow up on/collect medical records, making entries in the *MSR* as you receive information.

Weeks 5-8

- Continue to revise the *MSR*:
 - Incorporate any and all medical information that speaks to applicant's functional impairments and severity of symptoms.
 - Include direct quotes from the applicant as well as your observations of how his/her illness/symptoms interfere with his/her ability to work.
 - Ask a colleague to review the report for clarity and grammar.
- Contact SSA SOAR contact and request an appointment at which you will submit the completed application. **Note:** This is not requesting an interview for the applicant, but is an appointment for the representative to submit the application documents. Begin attempts to contact SSA *at least 1-2 weeks before the 60-day deadline* to allow for potential scheduling conflicts.
- Once you are ready to submit the completed application package (24-48 hours before the SSA appointment):
 - Transfer information from the paper *SSA-16* to the online *Disability Benefit Application* submit.
 - Transfer information from the paper *SSA-3368* to the online *Adult Disability Report* and submit. In the remarks section, note any treatment sources that have not yet sent information so DDS can follow up on these.
 - Complete and sign the online medical release form (*SSA-827*), which allows SSA to have an electronic version of the medical release you had the applicant sign on Day Two.

REMINDER - A Complete Initial Application Package consists of:

1. SOAR Checklist for Initial Claims as a cover sheet for the completed application package
2. Complete *SSA-1696* signed and dated by the applicant and representative
3. *MSR* signed by the SOAR provider as well as the applicant's physician or psychologist
4. Copies of all medical records in chronological order
5. Complete *SSA-8000* signed and dated by applicant
6. *SSA-16*, *SSA-3368*, and *SSA-827* submitted on-line **24-48 hours** before turning in completed application to SSA