# SSI/SSDI Application Process for SOAR-Assisted Claims in Washington

The SOAR Process is a collaborative effort between SOAR providers, the Social Security Administration (SSA), and Disability Determination Services (DDS) to establish procedures and expectations for the processing of SSI/SSDI applications submitted by SOAR providers. It is flexible and allows for customization to reflect local preferences (e.g. hand delivery vs. electronic submission, methods of requesting SSA status, etc.). Establishing a SOAR Process helps to ensure that SOAR providers are following procedures agreed upon by SSA/DDS and sets expectations for submission of high quality, complete SSI/SSDI applications.

1. **Gather information on prior/pending claims (if necessary)**
	* The SOAR provider will have the potential applicant complete and sign the SSA-3288: *Consent for Release of Information*, if requesting information about a prior or pending SSI/SSDI application.
	* The local SSA office contact will respond by providing requested information about the applicant’s prior or pending claims.

1. **Set the protective filing date (PFD)**
	* The SOAR provider will assist the applicant in setting the PFD via **one** of these methods:
	* Initiating the Online Disability Benefits Application at <https://www.ssa.gov/benefits/disability/> and stopping when reaching the re-entry number screen; or
	* Calling SSA to set an appointment for an in-person or telephone interview
	* The SOAR provider now has **60 days** to submit the application.
2. **Maintain Communication**
	* During the 60-day protective filing period, the SOAR provider will consult with the SSA representative with any questions.
3. **Submit the application packet to SSA**
	* Within a *maximum* of 60 days of the protective filing date, the SOAR provider will hand-deliver (or mail during office closures) the following completed forms and documents to the local SSA office contact. *(NOTE: The Online Disability Benefits Application should be completed and submitted 24-48 hours before the paperwork is delivered to SSA).*
	* SOAR Checklist for Initial Claims (available at <https://soarworks.samhsa.gov/article/soar-tools-and-worksheets>)
	* SSA-8000: *Application for Supplemental Security Income* (SSI) along with any needed supporting documentation
	* SSA-827: *Authorization to Disclose Information to SSA*
	* SSA-1696: *Appointment of Representative*
	* SSA-3373: *Adult Function Report*
	* \*Medical records and the Medical Summary Report will be submitted to DDS via fax or Electronic Records Express (ERE)
	* **IMPORTANT:** Service providers MUST be aware that missing the 60-day deadline will result in a termination of the protective filing period and a potential loss of benefits for the applicant. In this case, a new application would need to be initiated. Toward the end of the 60-day protective filing period, SSA may send a “close-out letter” alerting the applicant that the claim will be terminated if this deadline is missed. *This is a routine letter, not a notification of termination of the protective filing period.*
4. **SSA Application Processing**
	* The SSA Claims Specialist will enter an electronic “HOMELESS” Flag for those cases that meet SSA’s criteria for homeless cases. In addition, the SSA representative will select MESSAGE, and add “SOAR.”
	* SSA will mail the claim receipt to the SOAR provider who submitted the SSA-1696.
5. **DDS Application Processing**
	* Upon receipt at DDS, claims will be assigned to a DDS Adjudicator.
	* The SOAR provider will contact DDS to request the DDS Adjudicator’s name and contact information assigned to the claim.
	* The SOAR provider will contact the DDS Adjudicator to request the bar-coded cover sheet for submitting records and to offer assistance, ensuring a rapid response to any additional questions or requests for information.
6. **\*Electronic Submission of Medical Records, SSA-3373 Function Report, and Medical Summary Report (MSR)**
	* The SOAR provider will submit medical records, the SSA-3373 Adult Function Report, and the MSR to DDS, via one of these methods:
		+ Electronic Records Express (ERE): <http://www.ssa.gov/ere>
			- SOAR providers will contact their Professional Relations Officer at DDS to sign up
		+ Fax using the barcoded cover sheet available from the DDS Adjudicator
			- Records will be automatically converted to electronic format and delivered to the applicant’s electronic file
7. **Submit SOAR-Assisted SSI/SSDI Application Outcomes in OAT**
* Report the outcome of the application in the SOAR Online Application Tracking (OAT) program: <https://soartrack.samhsa.gov/login.php>

## **SSA Contacts (Homeless Coordinators)**

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| **Office Name**  | **Homeless Coordinator**  | **Telephone Number**  | **Email Address**  |
| Seattle Regional Office | Andrew Martinez | (206) 615-3606 | Andrew.J.Martinez@ssa.gov |
| Auburn WSU | Tandi Patterson | (253) 288-4401 | Tandi.Patterson@ssa.gov |
| Bellevue | Mike Tselnik | 866-574-2534 X 14811 | mike.tselnik@ssa.gov |
| Bellingham | Elizabeth Loehr | 866-256-6069 X 10301 | elizabeth.loehr@ssa.gov |
| Burien | Tonya Boren | 866-964-7385 X 26235 | Tonya.Boren@ssa.gov |
| Centralia | Bonnie Holden | 855-848-7944 X 22902 | bonnie.holden@ssa.gov |
| Everett | Pavel Pavlov | 866-563-4595 X 21446 | pavel.pavlov@ssa.gov |
| Grays Harbor | Melissa Johansson | 855-634-4202 X 20812 | melissa.johansson@ssa.gov |
| Kent | Mary Anne Tandoc | 866-931-4491 X 19036 | Mary.Anne.Tandoc@ssa.gov |
| Kitsap | Irina Beynon | 855-820-0101 X 11035 | Irina.Beynon@ssa.gov |
| Longview | Franchesca Arriaza | 866-495-0044 X 20005 | Franchesca.Arriaza@ssa.gov |
| Lynnwood | Afia Eneva | 877-575-5197 X 16012 | Afia.Eneva@ssa.gov |
| Mt Vernon | Anna McAlpine | 866-931-6149 X 23411 | anna.mcalpine@ssa.gov |
| Olympia | Elaine Corona | 866-807-1160 X 20436 | Elaine.Corona@ssa.gov |
| Olympia | Elaine Corona | 866-807-1160 X 20436 | elaine.corona@ssa.gov |
| Port Angeles | Linda Milner | 877-311-2641 X 12520 | linda.milner@ssa.gov |
| Puyallup | Twee Vo | 855-886-9627 X 12900 | twee.vo@ssa.gov |
| Seattle Metro | Joanie Thomas | 866-494-3970 X 15602 | joanie.thomas@ssa.gov |
| Seattle North | Jill Wagner | 866-931-2875 X 13831 | jill.wagner@ssa.gov |
| Spokane | Audra Packer | 866-331-7088 X 22443 | Audra.Packer@ssa.gov |
| Tacoma | Bree Nason | 888 561 8959 X 25628 | bree.nason@ssa.gov |
| Tri-Cities | Oscar Gomez | 866-269-6671 X 11327 | Oscar.Gomez@ssa.gov |
| Vancouver | Amanda Thulin | 866-605-8967 X 20603 | amanda.thulin@ssa.gov |
| Walla Walla | Maria Artis | 866-366-7814 X 22801 | Maria.Artis@ssa.gov |
| Warrenton | Mistee Messing | 877-604-9392 X 25800 | Mistee.messing@ssa.gov |
| Wenatchee | Angelica Solorio | 877-663-3130 X 28622 | Angelica.Solorio@ssa.gov |
| Yakima | Lily Monterroso | 866-964-7046 X 11603 | Lily.Monterroso@ssa.gov |

## **DDS Contact (Professional Relations)**

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| **Office** | **Name** | **Phone** | **Fax** | **Email** |
| Olympia | Uyen Kashani | 360-664-7437 | 360-586-3578 | Uyen.Kashani@ssa.gov |

\*Uyen is the primary contact as Professional Relations Specialist and will delegate to other offices and staff as necessary.

**VA Medical Records Access Protocol for SOAR Providers And DDS**

* The DDS and the VA have an agreement for the electronic transfer of records.
* The DDS is able to obtain these records in a very short period and prefers to do so directly with the VA since these records are formatted to be compatible with the SSA’s electronic claims system.
* It is helpful for the SOAR staff to be familiar with the content of the VA records and to clarify/amplify any relevant information in the medical summary report written by SOAR-trained staff.
* If the SOAR provider is not a part of the VA, when appropriate, he or she should collaborate with the appropriate VA staff for the submission of the VA records in accordance with the VA/DDS agreement.
* The SOAR provider should maintain regular and consistent communication with the DDS to assure that all applicant information is submitted in accordance with the VA agreement and the SOAR process.

**Department of Social and Health Services (DSHS) SSI Facilitation And SOAR**

* If an individual is homeless and working with a SOAR SP, the SP may contact the SSIF in the CSO to work in collaboration and assist the individual in applying for SSI/SSDI.
* SSIF’s must adhere to agency specific timeframes when facilitating an application for a cash assistance client. Communicate about the status of the application process with the SSIF.
* The SSIF or SP will ask the applicant to sign a release of information so that the SP and SSIF can share information.
* The SOAR provider and SSIF should communicate throughout the application process regarding the progress of the SSI/SSDI application, potential resources available, contact information changes, etc.
* If the individual receives ABD cash benefits and applies for SSI, he or she will be asked to sign a reimbursement agreement (IARA) with the CSO. If approved for SSI, ABD benefits paid out during the time of SSI eligibility are reimbursed back to the State. This does NOT apply to SSDI or VA benefits.
* The CSO offers benefits including food assistance, cash assistance, childcare, medical benefits, or long-term care. To find out more about these services, go to: <https://www.dshs.wa.gov/esa/community-services-offices/services-we-offer>
* To apply, go on-line to <https://www.washingtonconnection.org/home/> or apply by phone at 1-877-501-2233 or in person (when the offices re-open) at any Community Services Office.
* DSHS CSD liaison for SOAR providers by Region:
	+ Region 1 - Darla Johnson, darla.johnson@dshs.wa.gov , 509-202-7065
	+ Region 2 - Rena Guadagnoli, rena.guadagnoli@dshs.wa.gov , 206-296-4158
	+ Region 3 – Marilyn Meldrich, marilyn.meldrich@dshs.wa.gov , 253-281-8930