# SSI/SSDI Application Process Template for SOAR-Assisted Claims

Customize this template to fit the needs of your local community

Creating a SOAR Process is a [collaborative effort](https://soarworks.samhsa.gov/article/ssa-and-dds-collaboration-tools)¹ 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; or
   * Visiting the local SSA office with the applicant
   * 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 and the DDS contact 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 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*
   * Medical records and collateral information (*may be submitted via fax or ERE\*)*
   * Medical Summary Report (MSR) documenting the applicant’s disabling conditions and limitations in physical and mental functioning, co-signed by an acceptable medical source who has treated the applicant, if possible (*may be submitted via fax or 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 representative 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, flagged claims will be sent to the DDS liaison for the assignment of the application to an examiner.
   * The DDS liaison will provide the examiner’s contact information to the SOAR provider
   * The SOAR provider will contact the DDS examiner early in the process to offer assistance, ensuring a rapid response to any additional questions or requests for information.
6. **\*Electronic Submission of Medical Records and MSR**
   * The SOAR provider will submit medical records/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 examiner
       - Records will be automatically converted to electronic format and delivered to the applicant’s electronic file

¹ <https://soarworks.samhsa.gov/article/ssa-and-dds-collaboration-tools>