

## Comparison of Usual SSI Application Process and SOAR Process

Week(s)	Usual Process	SOAR Process
1	<ul style="list-style-type: none"> <li>▪ Make initial assessment to determine whether applicant needs assistance to apply for benefits.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Make initial assessment to determine whether applicant needs assistance to apply for benefits.</li> </ul>
1-2	<ul style="list-style-type: none"> <li>▪ Establish Protective Filing Date by calling SSA.</li> <li>▪ Take applicant to SSA to file SSI and SSDI applications</li> </ul>	<ul style="list-style-type: none"> <li>▪ Establish Protective Filing Date - fax in SOAR form from Module 16</li> <li>▪ Have applicant sign Appointment of Representative form (SSA -1696) and duplicate releases for previous treatment providers (one for assisting agency and one for SSA).</li> <li>▪ Review SSA Disability Report (SSA-3368) and use as a guide (do paper version) to create complete list of agencies/others for whom releases are needed.</li> <li>▪ Fax/mail/phone requests for medical and other records.</li> <li>▪ Continue gathering medical records and assessing applicant.</li> </ul>
3-8	<ul style="list-style-type: none"> <li>▪ Receive requests for completion of SSA Disability Report (SSA 3368) by psychiatrist. Complete and return to SSA.</li> <li>▪ Receive requests for completion of ADL form by applicant or staff. Complete forms and return to SSA</li> <li>▪ Applicant may not respond to requests for information by SSA; case manager may not know this; SSA can't locate applicant and the application is denied for lack of follow-up.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Continue gathering medical records and assessing applicant.</li> <li>▪ Write Medical Summary Report/Letter using the medical records received; integrate personal and treatment history in narrative; include your observations, assessment, and quotes from the individual so DDS' four functional areas of concern are clearly addressed.</li> <li>▪ Have Medical Summary Report/Letter co-signed by physician or psychologist who has seen the person</li> <li>▪ Complete on-line forms - SSDI application (SSA-16) and disability report (i3368pro)</li> <li>▪ Make appointment with SSA to complete SSI application (SSA-8000) which is not available on-line. This form must be completed within 60 days of establishing the protective filing date.</li> </ul>
9-16	<ul style="list-style-type: none"> <li>▪ Wait for applicant to tell you that they have received a letter from SSA with a decision</li> <li>▪ Applicant may be sent for consultative exam (CE); he/she may not show up for the exam and the application is denied</li> </ul>	<ul style="list-style-type: none"> <li>▪ Find out name of adjudicator at DDS and call to establish relationship. Ask if he/she received copy of the 1696 Appointment of Representative form</li> <li>▪ Get bar code information identified with applicant and fax supporting documentation to adjudicator</li> <li>▪ Continue to gather information as needed and send to DDS adjudicator.</li> </ul>
16-20	<ul style="list-style-type: none"> <li>▪ Continue waiting for decision</li> </ul>	<ul style="list-style-type: none"> <li>▪ SSA decision regarding disability status mailed to applicant and to you as the Representative</li> </ul>
20 or longer	<ul style="list-style-type: none"> <li>▪ SSA decision regarding disability status mailed to applicant</li> <li>▪ Typically, the application is denied</li> <li>▪ The applicant appeals and may wait 2-3 years for a hearing OR</li> <li>▪ Applicant is discouraged and does not appeal.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Applicant is able to be placed in housing, receive treatment and supports; begins process of recovery...</li> </ul>

