

Steps to Completing a Child SSI Application using the SOAR Model

This guide will help you complete an SSI/SSDI application using the SOAR model. You have 60 days from the protective filing date to submit a complete application packet to the Social Security Administration (SSA). We encourage you to complete the process in less time as you are able.

Documents needed to complete the process:

Find SOAR worksheets at <https://soarworks.samhsa.gov/article/soar-tools-and-worksheets-child-ssi-applications>

Find SSA forms at <https://soarworks.prainc.com/article/ssa-forms-and-resources>

- *SOAR Checklist for Initial Claims* (used as cover sheet of application package)
- SSA-3288: Consent for Release of Information (optional, see below)
- *SOAR Medical Summary Report (MSR) Interview Guide and Template*
- SSA-827: Authorization to Disclose Information to SSA
- *Agency Release of Information*
- SSA-1696: Appointment of Representative
- SSA-8000: Application for Supplemental Security Income (SSI)
- SSA-3820: Disability Report - Child

The following forms may be included in the packet if they are relevant to the case:

- SSA-8010: Statement of Income and Resources (obtain from or complete with your local SSA Field Office)
- SSA-3375, 3376, 3377, 3378, or 3379: Child Function Reports (by Age)
- SSA-5665: Teacher Questionnaire

Step One

- If you need to verify whether the applicant has a pending SSI/SSDI application, complete and submit the SSA-3288 or call the local SSA office while with the parent/caregiver or with the youth, if unaccompanied.
 - The SSA-3288 can also be used to request records from SSA about prior SSI applications.
- Assist applicant in setting a protective filing date (PFD) by initiating the Online Child Disability Report at <https://www.ssa.gov/benefits/disability/apply-child.html> (**recommended**); OR calling SSA to establish a date for an in-person or telephone interview; OR visiting a local SSA office without an appointment.
- Once the PFD is set, you have 60 days to submit the complete SSI application to SSA. SOAR recommends submitting the entire application packet, but the SSI application, at a minimum, must be submitted during that window.

Step Two

- Have the parent/caregiver or unaccompanied youth sign both an SSA-827 and an Agency Release of Information form for each hospital, clinic/doctor's office, and school at which he/she remembers the child receiving services. Fax a signed SSA-827 and Agency Release to each treatment source within 24-48 hours of initiating the application process.
- If the child is currently in school, obtain a release to speak with the child's teacher and ask him/her to complete the SSA-5665 Teacher Questionnaire.
- Contact the child's primary medical provider and inform them that you are assisting the child to apply for SSI. Ask for input and let them know you'll be requesting the provider's signature on a summary of how the child's illness and symptoms affect his/her ability to function.
- Utilize the Medical Summary Report (MSR) Interview Guide and Template to begin writing the child's MSR. Begin this report immediately so that you have the full 60 days to complete it.

Step Three

- Complete and have child's parent/caregiver sign an SSA-1696 appointing you as the Authorized Representative.

- *Note:* Do **not** submit the SSA-1696 to SSA before completing the initial SSI application, as SSA requires an application to be in progress in order to file an SSA-1696.
- Meet with the parent/caregiver (and child, as needed) 1-2 times per week to gather information using the MSR Interview Guide; enter information into the appropriate sections on the MSR Template as you go.
- As you collect information about the child’s medical treatment, education, and work history, fill in the SSA-3820. You will transfer information from this paper form to the Online Child Disability Report in Step Five.
- Continue to work with child’s primary treatment provider to obtain additional information and get a commitment for a co-signature on the MSR (this allows it to be considered medical evidence).

Step Four

- Complete and have parent/caregiver sign the SSA-8000 and obtain any needed supporting documentation (e.g., bank statements, documentation of resources, etc.).
 - *Note:* You will submit the SSA-8000 in Step Six if you have made arrangements with your local SSA office to do so.* Otherwise, complete this form as a worksheet in preparation for parent’s/caregiver’s interview with SSA.
- If applicable, have the parent/caregiver complete an SSA-8010, Statement of Income and Resources. This can be done as a worksheet in preparation for the parent/caregiver’s interview with SSA.
- Continue to write and revise the MSR
 - Ask a colleague or the SOAR TA Center to review the report for clarity and grammar.
- Contact SSA (SOAR contact, if available)* and request an appointment to submit the completed application. Begin attempts to contact SSA *at least* 1-2 weeks before the 60-day deadline.
 - *Note:* This is not requesting an interview for the child or parent. Rather, it is an appointment for you as the representative to submit the application packet.

Step Five

Once you are ready to submit the complete initial application packet (about 24-48 hours before SSA appointment):

- Transfer information from the paper SSA-3820 to the Online Child Disability Report
- In the remarks, note any treatment sources that have not sent information so Disability Determination Services (DDS) can follow up. Include “SOAR application” in the remarks.*

Step Six

- Submit complete initial application packet to your local SSA office:
 - SOAR Checklist for Initial Claims as a cover sheet for the completed application packet
 - SSA-1696 signed and dated by the parent/caregiver and representative
 - SSA-8000 signed and dated by parent/caregiver
 - SSA-827 signed and dated by the parent/caregiver
- After the initial application packet has been transferred to DDS, submit the following documentation using Electronic Records Express (ERE) or fax using a bar-coded cover sheet provided by DDS:
 - MSR signed by the SOAR provider as well as the applicant’s medical provider
 - Copies of all medical and educational records in chronological order

Step Seven

- Report the outcome of the application in either the SOAR Online Application Tracking (OAT) program or via your state’s method.*

** These steps are reliant upon the SOAR Process established in your state or community. Find out more at <https://soarworks.samhsa.gov/state-directory>.*