# SSI Application Process Template for SOAR-Assisted Child Claims

Customize this template to fit the needs of your local community

Creating a SOAR Process is a [collaborative effort](https://soarworks.prainc.com/article/ssa-dds-collaboration)¹ between SOAR providers, the Social Security Administration (SSA), and Disability Determination Services (DDS) to establish procedures and expectations for the processing of child SSI 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 applications.

1. **Gather information on prior/pending claims (if necessary)**
   * The SOAR provider will complete and submit the SSA-3288: *Consent for Release of Information*, if requesting information about a prior or pending SSI 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 Child Disability Report at <https://www.ssa.gov/benefits/disability/apply-child.html> (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 parent/caregiver or unaccompanied youth.
   * 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 Child Disability Report should be completed and submitted 24-48 hours before the paperwork is delivered to SSA).*
   * SOAR Checklist for Initial Child SSI Claims (available at https://soarworks.prainc.com/article/soar-tools-and-worksheets-child)
   * 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, Educational records, and other 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\*)*
   * If applicable:
     1. SSA-3375, 3376, 3377, 3378, or 3379: Child Function Report, based on age
     2. SSA-5665: Teacher Questionnaire
     3. SSA-8010: Statement of Income and Resources
   * **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.prainc.com/article/ssa-dds-collaboration>