

Comparison of Usual SSI Application Process and SOAR Process

Week(s)	Usual Process	SOAR Process
Week 1	<ul style="list-style-type: none"> ▪ Make initial assessment to determine whether applicant needs assistance to apply for benefits. 	<ul style="list-style-type: none"> ▪ Make initial assessment to determine whether applicant needs assistance to apply for benefits.
Weeks 1-2	<ul style="list-style-type: none"> ▪ Establish Protective Filing Date by calling SSA. ▪ Take applicant to SSA to file SSI and SSDI applications 	<ul style="list-style-type: none"> ▪ Establish Protective Filing Date - fax in SOAR form from Module 16 ▪ Have applicant sign Appointment of Representative form (SSA -1696) and duplicate releases for previous treatment providers (one for assisting agency and one for SSA). ▪ Use paper version of SSA Disability Report (SSA-3368) to create complete list of agencies/others for whom releases are needed. ▪ Fax/mail/phone requests for medical and other records. ▪ Continue to gather medical records and assess applicant.
Weeks 3-8	<ul style="list-style-type: none"> ▪ Applicant receives a request to complete ADL form by applicant or staff. Complete forms and return to DDS ▪ Applicant may not respond to requests for information by DDS; case manager may not know this; DDS can't locate applicant and SSA denies the applicant for lack of follow-up. ▪ DDS sends form to treating psychiatrist for completion. Psychiatrist may or may not complete the form. 	<ul style="list-style-type: none"> ▪ Continue gathering medical records and assessing applicant. ▪ 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. ▪ Have Medical Summary Report co-signed by physician or psychologist who has seen the person ▪ Complete on-line forms - SSDI application (SSA-16) and disability report (i3368pro) ▪ 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. ▪ Assemble SOAR application packet for submission to SSA at time of appointment. ▪ Ensure that application packet includes medical records, Appointment of Representative form, and Medical Summary Report/Letter
Weeks 9-16	<ul style="list-style-type: none"> ▪ Wait for applicant to tell you that they have received a letter from SSA with a decision ▪ Applicant may be sent for consultative exam (CE); he/she may not show up for the exam and the application is denied 	<ul style="list-style-type: none"> ▪ 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 ▪ Ask for applicant's bar code information and fax any additional supporting documentation to adjudicator ▪ Continue to gather information as needed and send to DDS adjudicator.
Weeks 16-20	<ul style="list-style-type: none"> ▪ Continue waiting for decision 	<ul style="list-style-type: none"> ▪ SSA decision regarding disability status mailed to applicant and case manager as the Representative
Week 20 or longer	<ul style="list-style-type: none"> ▪ SSA decision regarding disability status mailed to applicant ▪ Typically, the application is denied ▪ The applicant appeals and may wait 2-3 years for a hearing OR ▪ Applicant is discouraged and does not appeal. 	<ul style="list-style-type: none"> ▪ Applicant is able to obtain housing, receive treatment and supports, and begin process of recovery