

Handy Tips

- The importance of the SSA-1696 Appointment of Representative form cannot be overstated. It provides wide access to information and costs nothing. In addition, using it does not pose liability for an agency. This is the most important tool in the case manager's tool chest.
- SSA prefers that individuals apply for SSDI on-line.
- Ensuring completeness of the non-medical part of the SSI application is as critical to the process as the medical information. Keep in mind that the application goes no further unless non-medical criteria are met.
- For SSI, applying in person can be helpful as the SSA claims representative is able to write observations of the individual on the application, even electronically.
- Providing needed non-medical documentation at the time of application can facilitate the process. SSA must see original documents; these will be copied and returned the same day.
- For immigrants, documentation of status is critical. SSA may have proof of someone's immigration status on record or be able to obtain it. Case managers should check with SSA before attempting to obtain costly copies of immigration papers, which take a long time to get. Pro bono immigration attorneys and agencies who work with immigrants can help verify status as well.
- Identification has become more of an issue with the passage of the Deficit Reduction Act in 2005. Often a photo ID is needed to enter government buildings. Work with SSA to determine a strategy for access prior to bringing individuals in to apply. Sometimes, agencies make photo IDs using a Polaroid or digital camera. Find out if SSA would accept such an ID.
- Case managers should ensure completeness and consistency of information on applications. Additional clarification is possible in the "Remarks" section of both paper and electronic forms. Case managers should not restrict information because of space limitations on a form. Add whatever is needed.
- Copy all paper documents before handing them in to SSA.
- Though not a requirement, agencies should consider using their address as a mailing address for individuals during the application process. This facilitates communication.
- Module III is an overview of major issues that arise during the SSI application process. Further details about this process are covered in the Stepping Stones to Recovery companion manual, including information on trusts, transfer of assets, and countable income.