



SOARing Together
Series 2: Letter 12 2021
SOAR/SSA Forms

Following and Utilizing the Fidelity of the SOAR Model and Methodology:

Following the SOAR methodology is more important than ever when submitting complete applications packets to the local SSA field offices and Disability Determination Services (DDS), in these ever changing and challenging times. Answering all questions on each form and submitting the forms in the proper order is always essential to the SOAR process. Applications not submitted properly or in the correct order may cause delay in the decision process with both SSA and DDS. With Social Security field offices having limited or closed offices, submitting applications in person or by mail is not an option that will benefit your decision time or your clients need for the expedited process. Request more information on the SOAR Ohio secured email for the quickest and safest way to submit SOAR Ohio assisted claims.

The first three forms (**SSA-3288, SSA-827 and SSA-1696**) are needed for setting the protective filing date (PFD). They should be submitted before you begin working on the claim with your client. As good practice, keep a copy of each to be included in the complete client SOAR Ohio assisted application packet.

SSA-3288: Consent for Release of Information- <https://www.ssa.gov/forms/ssa-3288.pdf>

This form allows you to receive information from SSA concerning any previous involvement the client may have had with SSA. I.e., Work History for SSDI claim, Prior or Pending claims with SSA as well as an indicator that this client will be filing a SOAR Ohio assisted claim with you and your agency.

SSA-827: Authorization to Disclose Information to SSA- <https://www.ssa.gov/forms/ssa-827.pdf>

With your client's signature, SSA has permission to gather any medical information for each hospital doctor and treatment center your client has visited.

Class 2: <https://soarworks.samhsa.gov/article/collecting-medical-evidence-completing-form-ssa-827>

SSA-1696: Appointment of Representative- <https://www.ssa.gov/forms/ssa-1696.pdf>

One of the five critical components of the SOAR Method is to act as the client representative.

Class 2: <https://soarworks.samhsa.gov/article/establishing-representative-role-completing-form-ssa-1696>

Once ready to submit applications, be sure to include all forms and that the forms are in correct order. Here is a quick review of the forms and the order that need to be submitted for all SOAR Ohio claims:

SOAR Checklist for Initial Claims-(enclosed) this form identifies claim as a SOAR Ohio assisted claim along with the DDS Homelessness Unit cover sheet.

SSA-8000: Application for Supplemental Security Income (SSI)-

https://soarworks.samhsa.gov/sites/soarworks.prainc.com/files/SSA-8000%20SSI%20Application_1.pdf

IMPORTANT INFO: the SSA-8000 must be filled out and submitted in paper format with the entire benefits application packet, not online, even if it is suggested by SSA to do the online version. The online version could put the client's claim at risk of not being completely reviewed if this is not their first time filing a claim.

Class 3: <https://soarworks.samhsa.gov/article/ssa-8000-application-supplemental-security-income-ssi>

SSA-16: Social Security Disability Insurance (SSDI) and SSA-3368: Adult Disability Report

<https://www.ssa.gov/forms/ssa-16-bk.pdf>

<https://www.ssa.gov/forms/ssa-3368-bk.pdf>

Both of these forms are completed on line. <https://www.ssa.gov/benefits/disability/> Please use this link for the online portion.

SSA-3369: Work History Report- <https://www.ssa.gov/forms/ssa-3369.pdf>

In this form, you want to list each job the client has had over the past 10-15 years. Please refer to:

https://soarworks.samhsa.gov/search/site?search_api_views_fulltext=ssa-3369

SSA-3373: Function Report- <https://www.ssa.gov/forms/ssa-3373-bk.pdf>

SOAR Ohio replaces the Medical Summary Report (another critical component of SOAR) with the SSA-3373 as most provider agencies cannot get a signed MSR from a medical provider.

Class 5: <https://soarworks.samhsa.gov/class/link-functioning>.

Using the **Steps to Completing an SSI/SSDI Application using the SOAR Model form** and the **Social Security Administration (SSA) Forms Guides** are both handy tools to use as guide for completing each step and for making sure you have followed the fidelity of the SOAR methodology for both beginners and our seasoned SOAR Ohio provider specialists.

The **Quality Review Checklist**- is another critical component of SOAR and will assist organizing the application. These three forms are for your own records and not to be included in the application pack.

https://soarworks.samhsa.gov/sites/soarworks.prainc.com/files/Quality_Review_Checklist_061417.docx

The appropriate forms completion and submission order follows the National SOAR best practices, fidelity to the model and allows for fewer delays as your client's claim is being processed. Please reach out if you have any questions.

Amy, Erica and myself wish you a wonderful holiday season and the very best in the coming new year!

Anyone not currently involved with SOAR Ohio or the process of utilizing these forms and process, please use contact information below or connect to COHHIO's SOAR Ohio webpage. <https://cohhio.org/programs/soar-ohio/>

We also invite each of you or your agency to share this newsletter's PDF version with any interested staff or agencies.

SOARing Together,
Candace Talty, BASW
SOAR Ohio and HNHF Coordinator
SOAR Ohio Local Lead

COHHIO

175 S Third St. Suite 580
Columbus, Ohio 43215
P:614.280.1984 ext. 137
F:614.463.1060

candacetalty@cohhio.org

Website: www.cohhio.org

<https://cohhio.org/programs/soar-ohio/>

<https://cohhio.org/housing-now-for-homeless-families-program/>