

## Illinois Modified SOAR Process for Initial Applications

<b>STEP 1: Facilitate Set-Up of Client’s Online SSA Account</b>
Ask your client if they already have access to an online “My Social Security” account. If yes, then sign in at this site: <a href="https://secure.ssa.gov/RIL/SiView.do">https://secure.ssa.gov/RIL/SiView.do</a> Once in move on to STEP 2.
If your client doesn’t have an online “My Social Security” account, then help them set one up following the instructions at the following site: <a href="https://secure.ssa.gov/RIR/CatsView.do">https://secure.ssa.gov/RIR/CatsView.do</a> Once created move to STEP 2.
If your client can’t access an existing account or can’t create a new account, then call your local SSA Field Office for assistance. You will likely have to go into the local SSA Field Office.
<b>TIP:</b> Learn more about the “My Social Security” account & how you can set it up here: <a href="https://www.ssa.gov/multimedia/webinars/benefitverificationslettersonline.html">https://www.ssa.gov/multimedia/webinars/benefitverificationslettersonline.html</a>
<b>STEP 2: Request a Benefits Verification Letter (BVL)</b>
Use the “My Social Security” account with your client present to request their BVL. The BVL will inform you if a SSDI and/or SSI Application for your client is pending as well as if they are currently receiving or have ever received SSDI and/or SSI benefits in the past.
If there is a pending application, then fill out and turn in the SSA-1696 Appointment of Representation form to the SSA and request information on the pending application. Evaluate your next steps based on the provided information.
If there is no pending application, then move to STEP 3.
<b>TIP:</b> Learn more about the online BVL & how you can get it here: <a href="https://www.ssa.gov/multimedia/webinars/benefitverificationslettersonline.html">https://www.ssa.gov/multimedia/webinars/benefitverificationslettersonline.html</a>
<b>STEP 3: Setting the Protective Filing Date (PFD)</b>
Initiate the Online Disability Application at the following site: <a href="https://secure.ssa.gov/iClaim/dib">https://secure.ssa.gov/iClaim/dib</a>
Stop at the Reentry Number—it should be about 5 screens into the process. Note the Reentry Number and Close Out Dates and exit the application. <b>DO NOT GO PAST THE REENTRY NUMBER.</b>
<b>STEP 4: Fill Out Representation &amp; Release of Information Forms</b>
Fill out the SSA-1696 Appointment of Representation, SSA-827 Authorization to Disclose Information, & your own agency’s Release of Information Forms with your client.
<b>TIP:</b> This step is just as the SOAR Training taught you.
<b>STEP 5: Begin Building Your Case</b>
Begin to collect medical records, work on the Medical Summary Review (MSR), and fill out paper copies of the SSA-16 Application for Disability Insurance Benefits, SSA-3368 Disability Report Adult, and SSA-8000 Application for Supplemental Security Income with your client.
<b>TIP:</b> Forms can be found here: <a href="https://www.ssa.gov/forms/">https://www.ssa.gov/forms/</a> MSR tools can be found here: <a href="https://soarworks.prainc.com/topics/medical-summary-report-msr">https://soarworks.prainc.com/topics/medical-summary-report-msr</a>
<b>TIP:</b> This step is just as the SOAR Training taught you.
<b>STEP 6: Setting Up the SSA Appointment</b>
Contact the SSA no later than 45 days after the PFD was set in order to schedule the interview for the SSI Application where you will also drop-off your client’s SSA Forms, Medical Records, & MSR.
<b>TIP:</b> This is your SOAR Packet, but there is no need to refer to it as such to the SSA.
<b>TIP:</b> Be sure to keep copies of all documents.
<b>TIP:</b> You can use your local SSA Field Office’s number or the National SSA phone number (1-800-772-1213) to schedule an appointment.
<b>TIP:</b> If you and your client can’t physically make an appointment for an in-person SSI Interview, then you can request a telephonic interview. At the time of the SSI telephonic interview request, be sure to also request a separate appointment to drop-off SSA Forms & Medical Records before the SSI interview— <b>THIS IS ONLY IF YOU USE THE TELEPHONIC SSI INTERVIEW.</b> If the SSA agent can’t fulfill this request, then you will have to turn in the SOAR Packet without an appointment at your local SSA Field Office (more info on that situation can be found in STEP 9).

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<b>STEP 7: Finishing the Online Disability Application</b>
Complete, review, and submit your client's Online Disability Application 1 to 3 Business Days before your scheduled appointment.
Print the Cover Sheet Document & the Receipt when prompted after submitting the Online Disability Application.
<b>TIP:</b> Use the paper SSA-16 Application for Disability Insurance and SSA-3368 Disability Report Adult that you completed to fill in the Online Disability Application.
<b>TIP:</b> You can reenter your previous Online Disability Application with the Reentry Number from STEP 3.
<b>TIP:</b> Be sure to keep a copy of the Cover Sheet & Receipt in your records.
<b>STEP 8: Assembling Your SOAR Packet</b>
Before the scheduled appointment, be sure to assemble all medical records as well as forms SSA-827, SSA-1696, and SSA-8000.
Place a copy of the Cover Sheet Document you printed after submitting the Online Disability Report on top of the assembled documents.
Fill out the SOAR Checklist for Initial Claims and place it on top of the Cover Sheet Document.
<b>STEP 9: Turning in Your SOAR Packet</b>
At the time of your scheduled appointment, turn in your completely assembled SOAR Packet.
<b>TIP:</b> If at the time of the appointment you are still waiting on medical records that is ok. Still turn in your packet; let the SSA worker know that more medical records are expected; and use a copy of the Cover Sheet document from the Online Disability Application to turn in future medical records.
<b>TIP:</b> If you scheduled an in-person SSI Interview, then this appointment will be the same as the scheduled in-person SSI Interview. You will just turn in your packet at the start of the interview.
<b>TIP:</b> If you scheduled a telephonic SSI Interview, then be sure to turn in your SOAR Packet <b>BEFORE</b> the SSI Interview.
<b>TIP:</b> If you were unable to secure a separate appointment from the telephonic interview in which to turn in your SOAR Packet, then you will need to go into your local SSA Field Office without an appointment to turn it in. <b>This unscheduled drop-off should occur before the SSI telephonic interview, but after you submit the Online Disability Application.</b>
<b>STEP 10: Completing the SSI Interview</b>
At the time of the scheduled appointment, you and your client will complete the SSI Interview with a SSA worker.
<b>TIP:</b> If your client fails to make it to the SSI Interview—telephonic or in-person—and you have already turned in the SSA-1696 Appointment of Representation, then you can complete the interview for your client. However, this is not optimal as additional information that only your client knows might be requested during the course of the interview.
<b>STEP 11: Keeping in Touch</b>
You will keep in contact with the DDS & the SSA during the Determination Process.
You will comply—to the best of your ability—with additional requests for information as the Appointed Representative.
<b>TIP:</b> It is suggested that every two weeks is a good check-in rate. At these check-ins you will ask if the SSA worker or the DDS worker require any further documentation.
<b>TIP:</b> At first you will only need to check-in with the SSA. However, if the SSA “clears” the case to the DDS, then you will need to ask for the contact information for the assigned DDS adjudicator. You will then need to check-in with the DDS adjudicator until the disability decision is determined and the case is sent back to the SSA. Then you will need to check-in with the SSA to determine next steps.