SSI/SSDI Outreach, Access and Recovery (SOAR)

Agenda

- Updates
- Reminders
- Disability Claim Technician Process
- Questions

Updates

Local Disaster procedures for North Carolina

- Social Security Card Requests for Individuals affected
- Immediate payment due to loss of funds

Updates cont..

- Effective 06/2024 – SSA updated systems and forms to align with past relevant work (PRW) change from 15 to 5 years.

- Supplemental Security Income (SSI) In-Kind Support and Maintenance (ISM)
  *Effective 09/30/2024 – SSA no longer included food in ISM calculations

- Wet signatures transitioned to digital signatures for over 30 SSA forms

- Removed signature requirements altogether for 13 forms.
    *Form SSA-787 (Medical Source Opinion of Patient's Capability)
    *Form SSA-789 (Request for Reconsideration/Disability Cessation
        Right to Appear)

Updates cont..

- All Appointed Representatives assisting SSI/SSDI claimants using the SSA-1696 must now **register as a Representative using the SSA-1699**

- Enhancements to the Appointment Representative Services (ARS) Application
  *Appointment Representative (AR) experience enhanced effective 06/2024 to include some pending cases and cases closed within 65 days.

- Field Office SOAR Work Incentive Liaison Training:
  *Mid-November *All NC Local FO WILS* (Role – Responsibilities)
  *SOAR Provider process – key bullets

Faxed Forms

Accepted

- <u>SSA-3368</u>: Adult Disability Report
- <u>SSA-3369</u>: Work History Report
- <u>SSA-821</u>: Work Activity Report
- <u>SSA-3288</u>: Consent for Release of Information
- <u>SSA-827</u>: Authorization to Disclose Information to SSA
- <u>SSA-1696</u>: Appointment of Representative
- <u>SSA-3373</u>: Function Report - Adult

ensure claimant signature is legible

Not Accepted

- SSA-16: Application for Social Security Disability Insurance (SSDI)
- <u>SSA-8000</u>: Application for Supplemental Security Income (SSI)

Disability Claim (SSA) Technician Process

Paper Application

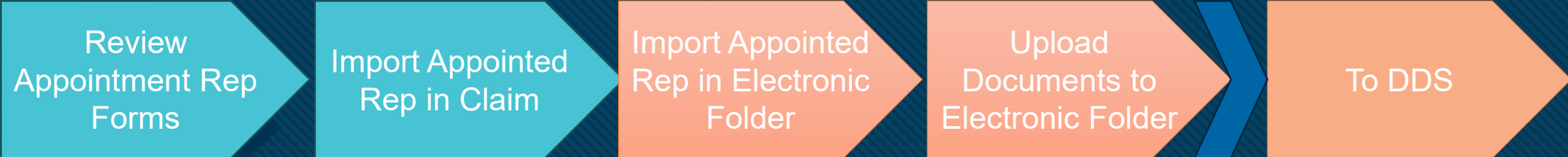| Received in mail or drop off box	Profile of Application and Forms	Technician Reviews Application/Keys	Technician Reviews Non-medical Criteria	Technician Loads SSA-3368 Disability Report
Management or designated technician scans document in SSA's online repository.	Management or designated technician reviews and profiles all forms – assigns to technician for processing.	Reviews documents against SSA records to ensure proper applicant/claimant is filing. Begins keying in SSA Systems.	Reviews claimant insured status; earnings; past and present work.	Keys All data from paper SSA-3368 into SSA web-based application.

Disability Claim (SSA) Technician Process

Paper Application cont.

Review Appointment Rep Forms	Import Appointed Rep in Claim	Import Appointed Rep in Electronic Folder	Upload Documents to Electronic Folder	To DDS
Input representative forms into another web-based application.	Technician re-enters the SSA-16 Disability Claim screens to import and propagate the appointed REP.	Technician re-enters the claimant's electronic folder to perform an update for Appointed Rep propagation.	Technician returns to where the documents are pending in the online repository to upload into the claimant's electronic folder.	All non-medical development complete – transfer to DDS.

8

Questions

Thank You