



## Idaho SOAR Process Checklist

*This tool is for SOAR Case Manager's only, DO NOT submit with application.*

Applicant's Name: \_\_\_\_\_ SSN: \_\_\_\_\_

Screening Date: \_\_\_\_\_ Protective Filing Date: \_\_\_\_\_ Online Application Due Date: \_\_\_\_\_

Re-entry #: \_\_\_\_\_

### 1. Determine Eligibility

- Applicant qualifies per *Identifying SOAR Applicants*

### 2. Establish Protective Filing Date

- Applicant present
- Online Disability Benefit Application initiated – select Save & Exit
- Agency Release of Information signed
- SSA-3288 signed **OPTIONAL**
- SSA-827 Authorization to Disclose Information to the Social Security Administration
- SSA-1696 Appointment of Representative

### 3. Necessary Forms and Documents to Complete the Online Application

- Medical Records requested
- SSA-8000: Application for Supplemental Security Income  
*If the applicant is in an institutional facility, please refer to Idaho SOAR Process document*
  - "Homeless" entered in Question 3: Residence address as well as in Remarks.
- SSA-3369 The Work History Report
- SSA-821 Work Activity Report **OPTIONAL**
- SSA-4814 Medical Report on Adult with Allegation of Human Immunodeficiency Virus (HIV) Infection **OPTIONAL**
- SSA-3373 The Function Report-Adult
- Medical Summary Report
  - Signed by an acceptable medical source **OPTIONAL**

### 4. Complete and Submit Online Disability Benefit Application *must be submitted online within 60 days*

- Applicant present
- Provide Background Information (SSA-16: SSDI Application)
  - SOAR info in Remarks *refer to Idaho SOAR Process document*
- Provide Disability Information (SSA-3368: Adult Disability Report)
  - SOAR info in Remarks *refer to Idaho SOAR Process document*
- Inform SSA Liaison a packet is on the way

### 5. Submit Paper Application Packet *must be submitted within 2 days of submitting online application*

- Paper packet submitted to SSA *refer to Idaho SOAR Process document for contents*
- Copy of packet in applicant's file
- Contact DDS if the applicant hasn't received confirmation from DDS within 10 days of paper packet submission

### 6. Determination of Benefits

- Enter determination into OAT