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Disclaimer

The following guide and checklist are meant to be used as references only. If more information is needed, please contact the Social Security Administration (SSA).

*Due to changes made by The Social Security Administration to their website, the screenshots included in this guide may appear a bit different than what you see online.

*Some of the language used in this guide comes straight from the Social Security Administration website.

Application Checklist (optional tool to use while applying for Social Security benefits)

<input type="checkbox"/>	Applying on-line	Application Start Date:	Application Completion Date:
<input type="checkbox"/>	Re-Entry Number (if application is completed online. This number will allow you to get back into an application that you haven't completed it in one sitting): <input style="width: 150px; height: 20px;" type="text"/>		
<input type="checkbox"/>	Name of any/all contacts you have spoken with at Social Security:		
<input type="checkbox"/>	Scheduled appointment date/time to complete applications with an SSA rep. (If by phone or in person—you must have a scheduled interview.)	Local SSA Office Address:	Local SSA Office Phone Number:
<input type="checkbox"/>	Over the phone or in-person Interview (if applicable)	Date of Interview:	
<input type="checkbox"/>	Date Letter is received from Disability Determination Services (DDS):	Name of contact at DDS:	Phone number for contact at DDS: Main # is: 303-368-4100
<input type="checkbox"/>	Additional supporting documents submitted to DDS (if needed):		
<input type="checkbox"/>	Application Decision:	Date Received:	Monthly Amount Awarded: \$

When to Apply for Benefits

Prior to age 18:	Families can apply at any time, if they feel that the family will qualify financially.
18 and already getting SSI (through the family):	<ul style="list-style-type: none"> ➤ Families should receive a letter for an appointment for the Redetermination and a packet for the Medical Review. The packet includes a form to list medical sources, medications, and other information. It also will include a medical release form that must be signed by the beneficiary and not the parent, even if the applicant is still 17. ➤ This should come by the individual's 19th birthday.
For an individual turning 18:	<p>Apply the first FULL month following their 18th birthday. Social Security does not consider someone 18 until they have been 18 for a full month.</p> <ul style="list-style-type: none"> ➤ Example: DOB is April 20th– apply mid May ➤ Example: DOB is April 3rd– apply at the beginning of May
18 years old and receiving survivor's benefits (a type of SSDI):	<p>Provide proof that the person is still in school to continue to receive the benefit until the age of 19. Have the school complete SSA form 1372 and submit this to your local SSA office: https://www.ssa.gov/forms/ssa-1372.pdf</p> <ul style="list-style-type: none"> ➤ Apply for SSI at age 18. ➤ At age 19– apply for Adult Disability Benefits.
For an individual turning 18 who is adopted and receiving an adoption subsidy:	<ul style="list-style-type: none"> ➤ The adoption subsidy is considered non-work income for the individual who was adopted. ➤ Depending on the amount of the subsidy, the individual may need to wait until their adoption subsidy ends (usually at age 21) and then apply for Social Security benefits.

Important Terms and Acronyms and their Definitions

The Social Security Administration (SSA): An independent Federal agency that, among other responsibilities, oversees two income support programs for people with disabilities: SSI and SSDI.

Supplemental Security Income (SSI): A government assistance program that provides supplemental income to specific populations to address basic needs (i.e., food, clothing, and shelter). To receive SSI benefits, an individual must be “financially needy and disabled; financially needy and aged (over the age of 65); financially needy and blind.”

Social Security Disability Insurance (SSDI): Federal disability program, administered by the SSA-that provides benefits to individuals who are blind or disabled who are “insured” based on contributions (through work) paid into the Social Security trust fund, as authorized by FICA. Medicare eligibility usually comes two years after the first SSDI payment.

Substantial Gainful Activity (SGA): To be eligible for disability benefits, a person must be unable to engage in substantial gainful activity (SGA). A person who is earning more than a certain monthly amount (net of impairment-related work expenses) is ordinarily considered to be engaging in SGA. For 2020, SGA is \$1260 if you are not seeing impaired and \$2110 if you are seeing impaired. For more information, please click on the following link:

<https://www.ssa.gov/OACT/COLA/sga.html>

Disability Determination Services (DDS): State agency that contracts with the SSA to review the medical portion of the application and make a disability determination.

Consultative Examination (CE): A consultative examination is sometimes ordered by the Disability Examiner. It is an evaluation performed by a physician or psychologist who contracts with the DDS to do such work. The evaluation is scheduled when existing medical evidence for an applicant collected by the DDS is insufficient to make a disability determination. SSA will pay for this exam if they have ordered it.

Claims Representative: SSA staff person who meets with the applicant and processes the application information.

Disability Examiner (DE): The staff person from Disability Determination Services who is assigned to work on and process the disability determination. This person examines the medical record and the applicant's forms, can order a

Consultative Examination, and can request medical opinions. They then reach a medical determination on whether the applicant meets the SSA's disability criteria.

Protective Filing Date: Date the applicant tells the SSA they intend to file for disability. This date is used to determine the eligibility date provided the applicant files an SSI application within 60 days and an SSDI application within 180 days.

Representative Payee: A person or an organization, appointed by the Social Security administration, to receive the Social Security or SSI benefits for anyone who can't manage or direct the management of his or her benefits.

General Information (from the SSA website)

The Social Security Administration (SSA) administers two programs that provide benefits based on disability: the Social Security disability insurance program (SSDI) (title II of the Social Security Act (Act)) and the Supplemental Security Income (SSI) program (title XVI of the Act).

Title II/SSDI provides for payment of disability benefits to disabled individuals who are "insured" under the Act by virtue of their contributions to the Social Security trust fund through the Social Security tax on their earnings, as well as to certain disabled dependents of insured individuals. Title XVI provides SSI payments to disabled individuals (including children under age 18) who have limited income and resources.

The Act and SSA's implementing regulations prescribe rules for deciding if an individual is "disabled." SSA's criteria for deciding disability may differ from the criteria applied in other government and private disability programs.

The Social Security Administration's Definition of a Disability

"Disability" under Social Security is based on your inability to work. They consider you disabled under Social Security rules if:

- You cannot do work that you did before;
- They decide that you cannot adjust to other work because of your medical condition(s); **and**
- Your disability has lasted or is expected to last for at least one year or to result in death.

(From the SSA website: <https://www.ssa.gov/disability/professionals/bluebook/general-info.htm>)

For all individuals applying for disability benefits under title II, and for adults applying under title XVI, the definition of disability is the same. The law defines disability as the inability to engage in any substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment(s) which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months.

Disability in Children

Under title XVI, a child under age 18 will be considered disabled if he or she has a medically determinable physical or mental impairment or combination of impairments that causes marked and severe functional limitations, and that can be expected to cause death or that has lasted or can be expected to last for a continuous period of not less than 12 months.

What is a "Medically Determinable Impairment"?

A medically determinable physical or mental impairment is an impairment that results from anatomical, physiological, or psychological abnormalities that can be shown by medically acceptable clinical and laboratory diagnostic techniques. The medical evidence must establish that an individual has a physical or mental impairment; a statement about the individual's symptoms is not enough.



1.GET READY/PREPARE! 2.APPLY! 3.FOLLOW-UP! 4.ACCOUNT SET UP!

Step 1: GET READY!! Gather Information and Prepare to Apply

***Similar to filing taxes, we suggest some preparation before you apply for Social Security benefits.**

1. If possible, it is recommended that you watch the short video provided online, which gives a brief outline of the online application process. It is 2 minutes and 30 seconds and is only available in English.
Go to: http://www.socialsecurity.gov/hlp/video/iclaim_d01.htm
2. Gather information!
 - General Information about the applicant
 - Medical Conditions/ Intellectual and Developmental Disability information
 - Paid Work/Job History
 - Start collecting supporting documentation

Supporting Document Collection

Social Security applicants must provide medical evidence to support a claim of having a disability. **DDS will contact** all medical professionals, therapists, etc. that are listed on the application to ask for supporting documents/medical records. We suggest you contact each of them to ask that they submit the requested documentation back to DDS as soon as they receive the request. **They will be given a short deadline.**

As a back-up, you are welcome to collect documentation that you can submit to DDS as well.

Below is a list of some common supporting documents that can be included with a Social Security application. This is not an exhaustive list. **You DO NOT have to have all of these documents collected prior to starting the application process.**

- IQ testing report (if over the age of 16, include testing done after the age of 16)
- Adaptive Skills and/or functional testing reports
- Most current Triennial Individualized Education Plan (IEP) report (if applicant is still in school or recently graduated)
- Doctor/Therapist/Psychologist/Psychiatrist letters and/or written opinions describing how the applicant's disability **affects their ability to work** (if over the age of 18)
- Laboratory testing and results (if related to your disability that affects the applicant's ability to work)
- Medical Reports
- Statements/letters from teachers about functional limitations (if applicant is still in school, or recently in school)
- A copy of a Professional Medical Information Page (PMIP) and 100.2 assessment (if in waiver services)
- Functional Report (this will be sent to the applicant by DDS to complete if it is needed)



Keep all of your information organized in a folder or notebook. Utilize the application checklist that accompanies the guide!

Tips and Tricks

- If the applicant is over 18 and is unable to apply without support, it is suggested that the following occur:
 - They should physically be in the room when the parent/mentor/provider applies on their behalf.
 - Click the following choice online: "I am applying for myself".
- Question regarding applying for SSI-- Do you intend to file for or want to file for SSI?-- **CHECK YES**
- Establish a protective filing date **prior to the end of the month**. This can be done by initiating an online application and getting far enough in the application to obtain the **re-entry** number or by calling the SSA to set up an appointment to apply for Social Security benefits. Note the day the call is made. This will be the applicant's **Protective Filing Date**.
- If you apply online, be sure to either **print or write down the applicant's re-entry #**. This will allow you to start an application, save it, and then go back in to finish it at a later time. If for some reason the number is lost, you'll need to create a **my Social Security account**. You can set it up by going to: <https://www.ssa.gov/myaccount/>
- **Print the "Confirmation" page**, the "Receipt," and a copy of the medical release for your records once you have completed the applicant's online application.
- **For security reasons, there is a time limit for viewing each page**. If you spend 25 minutes on a page without making any changes, you will receive a warning, but you will be able to extend your time on that page if needed.
- **Keep track of the dates** you send information to Social Security or talk to them, as well as the name of any Social Security employees with whom you speak.
- If you take any paperwork into the SSA, **get date stamped copies**.
- Make sure the information is **consistent** throughout the application and supporting documentation.
- **Complete ALL questions** on the application/forms. Do not leave anything blank and be as detailed as possible.
- If asked to complete extra forms, complete them and **return before the due date and** follow the instructions provided as to how to return the paperwork.
- If asked to meet with one of Social Security's doctors for a **consultative exam**, make every effort to be available on the date that you are assigned.
- Appointment times are limited to 90 minutes, so **be prepared for your appointment!**

Step 2: Apply for Benefits

Ways to apply

- **In person** at your local Social Security office with a **scheduled in-person interview**.
- **By phone**—call your local Social Security office to **schedule the phone interview** or call the main 800 number for Social Security. They can assist with applications as well.
- **Online**—recommended for a faster application process.

There are 2 parts of the application:

- ✓ The Disability Report
- ✓ The SSI application

Both can be completed online. Just be sure to select that you wish to apply for SSI while completing the disability report.

The Adult Disability Report

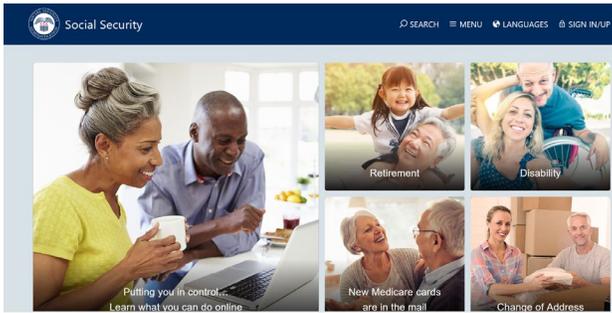
- Section 1: Information about the applicant
- Section 2: Contacts
- Section 3: Medical conditions
- Section 4: Work activity
- Section 5: Education and training
- Section 6: Job history (where, when, pay)
- Section 7: Medicines
- Section 8: Medical treatment (providers; hospitalizations)
- Section 9: Other medical information
- Section 10: Vocational rehab, employment, or other support services
- Section 11: Remarks

The SSI Application

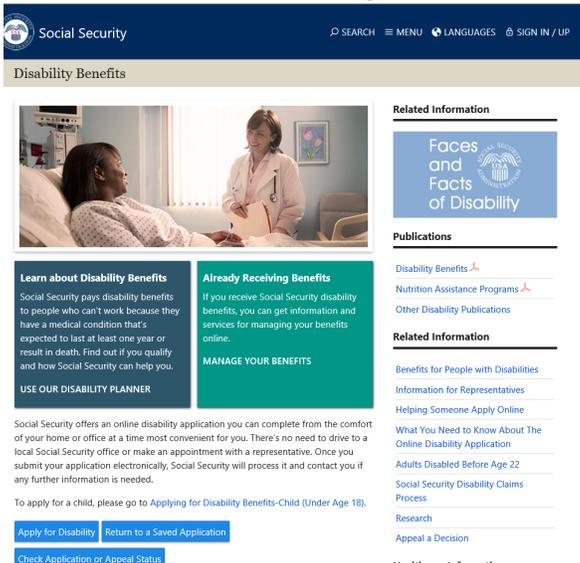
- Part 1: Basic Eligibility
- Part 2: Living Arrangements
- Part 3: Resources
- Part 4: Income
- Part 5: Potential Eligibility for food stamps, medical assistance/other benefits
- Part 6: Miscellaneous
- Part 7: Remarks
- Part 8: Important Information and signatures

Applying Online

- Go to <http://www.ssa.gov/> and click on **Disability** or go directly to: <http://www.ssa.gov/disabilityssi/apply.html>

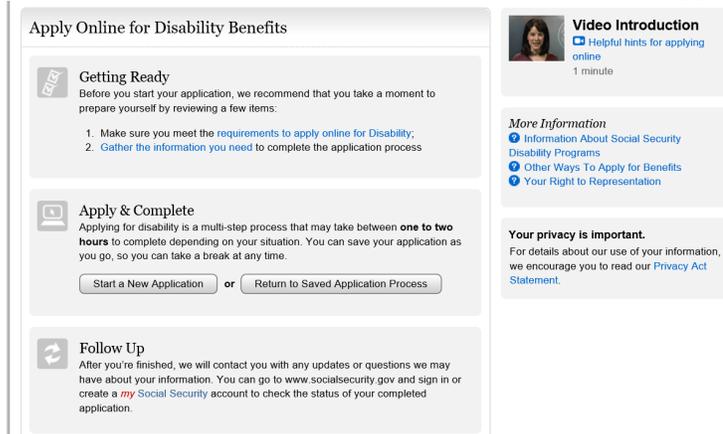


You will then see the following screen:



Click on Apply for Disability

That will bring you to this screen. Click on: **Start a New Application**



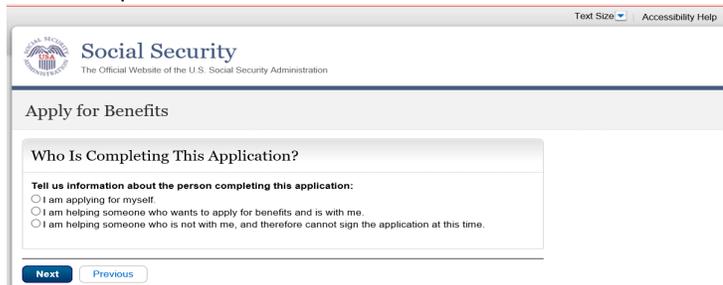
The screenshot shows the 'Apply Online for Disability Benefits' page. It is divided into several sections:

- Getting Ready:** A section with a camera icon and a list of two items: 1. Make sure you meet the [requirements to apply online for Disability](#); 2. Gather the [information you need](#) to complete the application process.
- Apply & Complete:** A section with a document icon and text stating: 'Applying for disability is a multi-step process that may take between **one to two hours** to complete depending on your situation. You can save your application as you go, so you can take a break at any time.' Below this text are two buttons: 'Start a New Application' and 'Return to Saved Application Process'.
- Follow Up:** A section with a refresh icon and text: 'After you're finished, we will contact you with any updates or questions we may have about your information. You can go to [www.socialsecurity.gov](#) and sign in or create a [my Social Security](#) account to check the status of your completed application.'

On the right side of the page, there are three additional boxes:

- Video Introduction:** Features a video thumbnail, the title 'Video Introduction', a link 'Helpful hints for applying online', and a duration of '1 minute'.
- More Information:** Contains three links: 'Information About Social Security Disability Programs', 'Other Ways To Apply for Benefits', and 'Your Right to Representation'.
- Your privacy is important:** Contains text: 'For details about our use of your information, we encourage you to read our [Privacy Act Statement](#).'

The first question is: **WHO IS COMPLETING THE APPLICATION?**



The screenshot shows the 'Apply for Benefits' form on the Social Security website. The header includes the Social Security logo and the text 'The Official Website of the U.S. Social Security Administration'. The main heading is 'Apply for Benefits'. Below this is a section titled 'Who Is Completing This Application?' with the instruction: 'Tell us information about the person completing this application:'. There are three radio button options:

- I am applying for myself.
- I am helping someone who wants to apply for benefits and is with me.
- I am helping someone who is not with me, and therefore cannot sign the application at this time.

At the bottom of the form are two buttons: 'Next' and 'Previous'.

Choose: I am applying for myself. If support is needed, the applicant should be in the room while their parent/mentor/provider is helping them to apply.

2. Complete the **Disability Report**:

Applicants over the age of 18 will be directed to complete the **Adult Disability Report**.

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

3. **Medical Release form:**

a. If you are completing the application for yourself: Sign and submit the **medical release form**. At the end of the report, the SSA will ask you to sign a medical release form (SSA-827), which allows SSA to get information from the applicant's doctors. This can be done electronically as part of the online Disability application, or you can print, sign, and send the form to your Social Security office. You will be able to print a cover sheet that you can use to send them the signed medical release and any medical records you already have in your possession.

b. If you checked that someone is helping you to complete the application, a medical release form will be mailed to you to sign and return to The Social Security Administration.

4. **Submit requested documents**—At the end of the online application, the applicant may be given a list of documents that the SSA would like to review. **Either mail or hand deliver** the documents the SSA has requested to your local Social Security office. It is recommended that if you hand deliver them to your local office you ask for **date stamped copies**.

5. You will be contacted by the SSA if they need more information about your claim. **Keep an eye out for mail from SSA.**

6. If the individual has not worked and does not have a parent who is deceased, collecting disability, or collecting retirement, then the applicant **will most likely receive a denial letter for SSDI**. This is NOT a denial letter for SSI.

7. SSA will review financial qualifications and then will forward the file to Disability Determination Services (DDS) to review the disability portion of the application.

8. Once DDS receives the file, they will send a letter to the applicant, stating that they are working on reviewing the disability portion of the application. **Keep an eye out for this letter!**
 - The letter from DDS should provide the name and contact information for the **Disability Examiner (DE)** who has been assigned to the applicant's case.
 - It may also contain **additional paperwork** that must be completed and returned by a specific due date.
 - You can always call DDS to check in if you haven't received the letter!

Step 3: Follow-up

PLEASE NOTE: If you submit supporting documents to the Social Security Administration, they will only fax the first 20 pages to DDS and then will mail the remaining pages. To best ensure that DDS receive all of the pages, we suggest the following:

- **Gather supporting documents** once you have completed the applications.
- **Keep an eye out for a letter from DDS.** You should receive this approximately 3-4 weeks after you have completed both the SSI and Disability applications.
- **Contact the Disability Examiner (DE) and ask the following questions:**
 - Did they get all of the supporting documentation that you submitted to the Social Security office?
 - Do they need additional supporting documentation? If so, what is the best way to get it to them?
 - Do they need help collecting paperwork from any of the medical professionals, therapists, teachers, etc. that were listed on the application?
 - Ask that they call you if they need ANYTHING.
- **Check the status of your application online.**
 - The applicant can check their application status by creating and then logging into a mysocialsecurity account. <https://www.ssa.gov/myaccount/>

Step 4: Account Set-up

1. Decide what account into which the SSA money will be directly deposited. Effective March 1, 2013, all SSA payments must be delivered electronically.
 2. Will the SSA recipient need a representative payee?
 - a. A rep payee helps beneficiaries who need assistance in managing their benefits/money.
 - b. In order to be a rep payee a person or organization must apply for and be appointed by SSA. Complete the **Appointment of Representative form**, listed in the next section of this guide.
 - c. Generally, a family member, provider, or friend serves as a representative payee.
- ❖ **For more information about Representative Payees, please go to:**
<https://www.ssa.gov/pubs/EN-05-10076.pdf>
- ❖ **Article from SSA about Representative Payees:**
https://blog.ssa.gov/making-wise-choices-when-a-representative-payee-manages-your-money/?utm_medium=email&utm_source=govdelivery



If you are denied, you can request a copy of the Filing a Social Security Appeal or Reconsideration Guide from your case manager at Developmental Pathways.

Important Forms

Form #	Form Name	Link
3368	Adult Disability Report (adults)	https://www.ssa.gov/forms/ssa-3368-bk.pdf https://secure.ssa.gov/apps6z/i3820/main.html
1372	Advance Notice of Termination of Child's Benefits (complete if receiving survivor's benefits, is 18, and still in school)	https://www.ssa.gov/forms/ssa-1372.pdf
1696	Appointment of Representative	http://www.socialsecurity.gov/forms/ssa-1696.pdf
827	Authorization to Disclose Information to SSA <ul style="list-style-type: none"> • Instructions for completing form 827 	http://ssa.gov/forms/ssa-827.pdf <ul style="list-style-type: none"> • http://ssa.gov/forms/ssa-827-inst.pdf
3820	Child Disability Report (children)	https://secure.ssa.gov/apps6z/i3820/main.html
3288	Consent for Release of Information	https://www.ssa.gov/forms/ssa-3288.pdf
3373	Function Report (adults)	http://www.socialsecurity.gov/forms/ssa-3373-bk.pdf
3369	Work History Report (adults)	http://www.socialsecurity.gov/forms/ssa-3369.pdf

Social Security Administration Contacts

- **Social Security:** 1-800-772-1213; 1-800-325-0778 TTY; <http://www.ssa.gov/>
- You can either call your local office or the main number for Social Security.

To find the applicant's local Social Security Office, go to the SSA website and click on **MENU**, then **CONTACT US**, and **FIND AN OFFICE**. Once you have done that, you should see the following screen:



Next, enter the applicant's zip code and press **LOCATE**. The chart below provides direct phone numbers to common field offices. If your local office is not listed below, please contact your case manager at Developmental Pathways for additional office contact information. The phone number provided on the SSA website is the national number for Social Security.



SSA Office	Phone	Address
Aurora	1-866-931-9965	14280 E Jewell Ave, Suite 250, Aurora, CO 80012
Boulder	1-877-405-5872	4949 Pearl East Circle, Boulder, CO 80301
Colorado Springs	1-888-880-0688	1049 N Academy Blvd., Colorado Springs, CO 80909
Denver	1-866-613-9904	1500 Champa St. 2 nd Floor, Suite 200, Denver, CO 80202
Lakewood	1-866-563-9469	13151 W Alameda Pkwy, Lakewood, CO 80228
Littleton	1-888-824-4384	8000 Southpark Lane, Littleton, CO 80120

Other Contacts

Contact	Application Assistance	Supporting document support	Application training/ Webinars
Your current case manager/coordinator at Developmental Pathways	Limited	PMIP and 100.2 assessment (if enrolled in waiver services)	n/a
All Health Network (must be an All Health Network member): http://www.allhealthnetwork.org/ ; 303-730-8858	Available	Unknown	Unknown
Mental Health Center of Denver (must be receiving services/supports from MHCD): 303-504-7900	Available	Unknown	Unknown
Mile High United Way: http://www.unitedwaydenver.org/ ; 303-433-8383; or dial 211	Available	Unknown	Unknown
Atlantis Community, Inc.: http://atlantiscommunity.org/ ; 303-733-9324	Yes	Unknown	Unknown
Easter Seals Disability Benefits Services (DBS): (303) 233-1666 x 230; dintake@eastersealscolorado.org https://www.easterseals.com/co/our-programs/work/disability-benefits-services/	Yes	Limited	Yes
Colorado Legal Services (assistance with the appeal process, if denied): 303-837-1321; http://www.coloradolegalservices.org/	Appeals/ request for reconsideration	Appeals/ request for reconsideration	No