

Steps to Completing a Child SSI Application



Maryland Center for Developmental Disabilities
at Kennedy Krieger Institute



This guide will help you complete a Supplemental Security Income (SSI) application. You have 60 days from the protective filing date to submit a complete application packet to the Social Security Administration (SSA).

Documents needed to complete the process:

- Checklist for Initial Claims (used as cover sheet of application package)
- SSA-3288: Consent for Release of Information (optional, see below)
- Medical Summary Report (MSR) Template (optional form)
- SSA-827: Authorization to Disclose Information to SSA
- SSA-8000: Application for SSI
- SSA-3820: Disability Report – Child

The following forms may be included in the packet if they are relevant to the case:

- SSA-8010-BK: Statement of Income and Resources (obtain from or complete with your local SSA Field Office)
- SSA-3375-BK, SSA-3376-BK, SSA-3377-BK, SSA-3378-BK, or SSA-3379-BK: Child Function Reports (by age)
- SSA-5665-BK: Teacher Questionnaire

STEP ONE

- If you need to verify whether you have a pending SSI application, complete and submit the SSA-3288 or call the local SSA office. The SSA-3288 can also be used to request records from SSA about prior SSI applications.
- Establish a protective filing date (PFD) by initiating the Online Child Disability Report at <https://www.ssa.gov/benefits/disability/apply-child.html> (recommended); OR calling SSA to establish a date for an in-person or telephone interview; OR visiting a local SSA Field Office without an appointment.
- Once the PFD is established, you have 60 days to submit the complete SSI application to SSA. We recommend submitting the entire application packet, but the SSI application, at a minimum, must be submitted during that window.
- You can complete the Child Disability Report online, but you must contact SSA to complete the SSI application. The SSI application cannot be completed online. You can apply in person or over the phone. You can locate your local field office here <https://www.ssa.gov/locator/>.

STEP TWO

- Either:
 - Request medical records from all of the child's providers to include with the application; or
 - Provide a detailed list of the child's providers, including addresses and telephone numbers, to the SSA so that they can request medical records.

Both of these are good options. The process may move faster when providing medical records. The important thing is to have an accurate and thorough list of providers.

- If the child is currently in school, speak with the child's teacher(s) and ask them to complete the SSA-5665-BK Teacher Questionnaire.
- Utilize the Medical Summary Report (MSR) Template to begin writing the child's MSR. Begin this report immediately so that you have the full 60 days to complete it.

STEP THREE

- As you collect information about the child's medical treatment, education, and work history, fill in the SSA-3820-BK. You will transfer information from this paper form to the Online Child Disability Report in step five.
- Continue to work with child's primary treatment provider to obtain additional information and get a commitment for a co-signature on the MSR (this allows it to be considered medical evidence). Look at the interview checklist for a list of information you will need to provide on your application.
- Start gathering information you will need.
- Make a list of all the providers your child has seen and a list of testing received.
 - SSA can request these documents for you, but the more information you can provide, the more quickly the process will move.
- Ask for letters from other non-medical sources such as social workers or family members that detail your child's impairment.

STEP FOUR

- Complete and sign the SSA-8000 and obtain any needed supporting documentation (e.g., bank statements, documentation of resources, etc.).
 - Note: you will submit the SSA-8000 in step six if you have made arrangements with your local SSA office to do so. Otherwise, complete this form as a worksheet in preparation for the parent's/legal guardian's interview with SSA.
- If applicable, complete an SSA-8010, Statement of Income and Resources. This can be done as a worksheet in preparation for the parent/legal guardian's interview with SSA.
- Continue to write and revise the MSR.
- Review the report for clarity and grammar.
- Contact SSA and request an appointment to submit the completed application. Begin attempts to contact SSA at least 1-2 weeks before the 60-day deadline.

STEP FIVE

- Once you are ready to submit the complete initial application packet (about 24-48 hours before SSA appointment):
 - Transfer information from the paper SSA-3820-BK to the Online Child Disability Report.
 - In the remarks, note any treatment sources that have not sent information so Disability Determination Services (DDS) can follow up.

STEP SIX

- Submit the complete initial application packet to your local SSA office:
 - Checklist for Initial Claims as a cover sheet for the completed application packet,
 - SSA-8000 signed and dated by parent/legal guardian (can be signed digitally),
 - SSA-827 signed and dated by the parent/legal guardian,
 - MSR signed by the applicant's medical provider, and
 - Copies of all medical and educational records in chronological order.
- SSA can request these documents for you, but the more information you can provide, the more quickly the process will move. Make a list of all the providers the child has seen and a list of testing received to provide to SSA.

STEP SEVEN

- If you have questions about your application, complete an intake with Project HEAL by calling **443-923-4414** or visit Project HEAL's website to complete an online intake form at: **KennedyKrieger.org/ProjectHEAL**
- The process of applying and receiving a determination can take up to one year. Do not be discouraged if you do not hear back from SSA right away.

CHECKLIST FOR INITIAL CHILD SSI CLAIMS

(application coversheet)

Date: _____ Child's name: _____

Child's Social Security Number (SSN): _____ Parent/legal guardian's SSN: _____

Parent/legal guardian's name: _____

Parent/legal guardian's phone #: _____

Caseworker's name: _____ Phone #: _____

Paper forms (all forms signed by parent/legal guardian when appropriate)

- SSA-827: Authorization to Disclose Information to the Social Security Administration (SSA)
- SSA-1696: Appointment of Representative
- SSA-8000: Application for Supplemental Security Income (SSI)

If applicable:

SSA-3375-3379: Child Function Report (choose appropriate age group)

- 3375: Birth to 1st Birthday
- 3376: Age 1 to 3rd Birthday
- 3377: Age 3 to 6th Birthday
- 3378: Age 6 to 12th Birthday
- 3379: Age 12 to 18th Birthday
- SSA-5665: Teacher Questionnaire
- SSA-8010: Statement of Income and Resources
- SSA-4815: Medical Report on Child with Allegation of Human Immunodeficiency Virus (HIV) Infection

Photocopies of income/resources for deeming purposes:

- Proof of current income for the child and family members living in the household (e.g., pay stubs, self-employment tax returns, unemployment tax returns, unemployment or other program benefits, child support).
- Proof of resources for the child and parents living in the household (e.g., bank account statements, life insurance policies, certificates of deposit). You may need to provide information about other adults contributing to household income.

Online forms

Disability Report – Child (SSA-3820) Submitted on: _____

Supporting Documentation

- Medical Summary Report
- Medical records
- Educational records