



Applying for SSI

A Short Guide for Case Managers

Supplemental Security Income (SSI) provides a modest monthly income to older adults aged 65 and older, and adults and children with serious disabilities who are struggling to make ends meet. **Here's how to apply!**

1 Prepare paperwork

a. Financial info

Be ready to tell the Social Security Administration (SSA) about all **income** (like wages, cash benefits, pensions, food & shelter provided by others), and **resources** (bank accounts, retirement/investment accounts, property). SSI has income and resource limits.

b. Disability information

Write down the names, addresses, and dates of recent appointments for **all** (past and present) doctors' offices (including specialists), hospitals, therapists, and schools.

2 Apply! You can apply two ways:

a. Virtually (with a call back) (offices are closed during the pandemic)

i. Submit disability information online. Save a receipt with the date the application was started. This is the protective filing date (PFD). Benefits go back to the month following the PFD.

1. **Adults:** <https://secure.ssa.gov/iClaim/dib>

2. **Children:** <https://secure.ssa.gov/apps6z/i3820/main.html>

ii. SSA will call to finish the application. They will get verbal consent to "sign" the application over the phone.

b. By Phone (do the full application by phone)

i. Call your local Social Security field office to schedule SSI appointment.

1. Contact info: <https://secure.ssa.gov/ICON/main.jsp>

3 Complete the SSA questionnaires

SSA asks people to fill out function reports and work history reports. These are hard to fill out.

a. Adult forms

i. Function reports (SSA 3373): Add a lot of detail about the help people need for activities of daily living (cooking, shopping, personal grooming, cleaning).

ii. Work reports (SSA 3369): Add a lot of detail every past job.

b. Child forms

Search online for SSA 3376, 3377, 3378, or 3379

4 APPEAL!

Most people get denied when they apply, but they win when they appeal. There are two levels of appeal. The first appeal is called "reconsideration." If SSA denies the case again, you can appeal and make your case to a judge.

To appeal, visit <https://secure.ssa.gov/iApplsRe/start>. You can also call the field office and ask for appeal paperwork.

Find the number for your local field office: <https://secure.ssa.gov/ICON/main.jsp>