

ATTACHMENT 4

**Working Agreement for SSI/SSDI Outreach, Access, and Recovery (SOAR) Initiative  
Community Provider Agency**

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*The Applicant agrees it shall designate staff to successfully complete SOAR to ensure the following:*

1. Participate in the SOAR Initiative to include the submission of SOAR web-based data outlined in this Working Agreement.
2. Contact the identified Social Security Administration (SSA) liaison according to the Applicant's United States Postal Office zip code, and create an individualized application submission procedure that will be utilized for all initial SOAR applications. The procedure shall include the agreed upon preferred method of communication with the SSA liaison and how the protective filing date will be established for each claim.
3. Shall submit claims for SOAR applicants within two (2) weeks of the notification.
4. Complete and submit a Form SSA 1696 Appointment of Representative listing the name of the individual and the agency that will serve as the SOAR claimant's representative. This form will be submitted with the application.
5. Follow up on any additional needed non-medical information for SSA within two (2) business days of notification of the need for information. This follow-up will either provide the documentation needed or notify SSA of the steps being taken to obtain the notification.
6. Receive notification from the SSA claims representative once the claim has cleared the non-medical process and has been sent to the Division of Disability Determinations (DDD). This notification will take place within 24 hours of sending the claim to the DDD.
7. Obtain all existing medical information and submit it to the DDD, once the application for SSI/SSDI is complete.
8. Contact the DDD office within one (1) week of notification of the claim having gone to the DDD to determine who the disability adjudicator is and make contact by phone with that adjudicator, notifying him/her of working with a SOAR claimant, confirming the authorized representative status, and informing the examiner of the records being collected.
9. Maintain contact with the DDD adjudicator as appropriate, to check on the status of the claim and to continue to submit information.
10. Submit all existing medical information and additional evaluation information to the DDD within 30 calendar days of the submission of the application to the DDD by SSA.
11. Submit the medical summary report to the DDD within 30 calendar days.
12. Collect data regarding SOAR applications and submit it on an ongoing basis, via the Policy Research Associates' (PRA) web-based data entry program.

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**Executive Director** *(Print Name)*

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**Applicant Agency**

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**Signature**

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**Date**