

Step-by-Step Application Process

Complete Important Forms

1

Complete form SSA-1696

- A. Go to the counselor support website - ssi.ohiobenefits.org
- B. Click the **Documents** tab
- C. Download form **SSA-1696**
- D. Complete the form with you client. Print, sign, and date the form in all the spaces marked for **Claimant** and **Representative**
- E. Give one copy to your client and file the other 3 copies in a hard-copy client file for later use

2

Complete Consent to Use Information Form

- A. From the documents tab of the counselor support site - ssi.ohiobenefits.org - download **Consent to Use Information** form
- B. Complete, print two copies, sign, and date the form
- C. Give one copy to your client and file the other copy in a hard-copy client file

3

Complete form SSA-827

- A. From the documents tab of the counselor support site - ssi.ohiobenefits.org - download form SSA-827
- B. Complete, print two copies, sign, and date the form
- C. Give one copy to your client and file the other copy in a hard-copy client file

Establish a Protective Filing Date

4

Obtain a Reentry Number

- A. Go to the United States Social Security Administration website - www.ssa.gov/applyfordisability
- B. Click **Apply for Disability** at the bottom of the page
- C. Click **Start a New Application**
- D. Continue filling applicable fields until a **Reentry Number** is generated
- E. Write this number down and immediately proceed to step 6

5

Create Client and Add Memos

- A. Log into TBB SSI/SSDI - ssi.thebenefitbank.org
- B. Click **Create New Client**
- C. Complete applicable fields
- D. Click **Create Client**
- E. Go to TBB SSI/SSDI - ssi.thebenefitbank.org
- F. Open the Client Portal Page for the client you are serving
- G. Type the **Reentry Number** into the Add Memo box
- H. Click **Create Memo Item**

Complete Applications

6

Submit Applications for Other Income Support Programs

- A. Go to TBB SSI/SSDI - ssi.thebenefitbank.org
- B. Open the **Client Portal Page** for the client you are serving
- C. Click **Ohio Common Application for Benefits** or **Ohio HEAP Application** to apply for these programs
- D. If completing the Ohio Common Application for Benefits turn electronic submission ON by switching the **ESUB** button to **YES**

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Complete the Ohio SSI/SSDI Application

IMPORTANT: This section may take several appointments to complete, so plan accordingly.

- A. From the client portal page of TBB SSI/SSDI - ssi.thebenefitbank.org - click Ohio **SSI/SSDI Application**
- B. Complete the following sections: **Client Background, Medical-General, Medical-Physical, Medical-Mental, Daily Living Activities.**

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Print applications, Review Information, Obtain Signatures

- A. In the **Forms for SSA** section of the application, carefully read and follow on screen instructions to enter impairments that limit your client's ability to work and final remarks
- B. Press **Save & Continue**
- C. Enter final remarks when applicable
- D. Press **Save & Continue**
- E. Open and review each application
- F. Print two copies of the **SSA-16** and **SSA-8000**
- G. Print one copy of the other TBB generated forms including **SSA-3369, 3368, 3373** and any other forms
- H. Client signs and dates one copy of the **SSA-16** and **SSA-8000**
- I. Counselor files signed **SSA-16, SSA-8000** and client leaves with all unsigned forms

Submit Application and Follow-up

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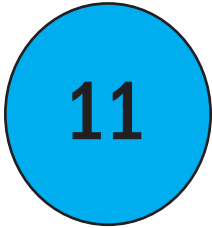
Email ssidata@ohiofoodbanks.org

- A. Find the client ID number:
 - From the Specialist Portal search for the client using the **Find a Client** tool
 - Highlight the client ID and click **Ctrl + C** to copy the number
 - Click the client name to open client account
 - In **Add Memo** box, click **Ctrl + V** to paste client ID
 - Click **Create Memo Item**
- B. Send an email to ssidata@ohiofoodbanks.org and include the following information:
 - “An application for SSI/SSDI is ready for submission”
 - Your name
 - Your client’s ID number
- C. You will receive a data entry receipt when your client’s application has been completed (generally within one business day), but you may proceed immediately to step 11

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Submit Applications and Forms to local SSA field office

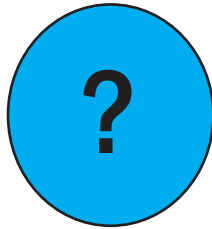
- A. Go to the counselor support website - ssi.ohiobenefits.org
- B. Click the **Documents** tab
- C. Download **Application Cover Sheet**
- D. Retrieve forms **SSA-1696** and **SSA-827** from the hard-copy client file (completed earlier in the process)
- E. Retrieve signed **SSA-16** and **SSA-8000**
- F. Check the box next to each form number on the Application Cover Sheet as the packet is assembled
- G. In the **Submission Date** box put today’s date
- H. Type the **Reentry Number** in the box provided (stored as a memo on the Client Portal Page, see step 5)
- I. Complete the form with your client’s name and your contact information
- J. *Mail or hand-deliver* the completed application packet to the appropriate local SSA field office



Maintain communication with SSA, DDS, and your client

Your responsibilities as Authorized Representative may include:

- Helping your client stay informed throughout the process
- Gathering medical evidence
- Gathering supporting evidence from non-medical sources
- Submitting verifications to SSA
- Submitting verifications to DDS
- Helping clients keep scheduled appointments
- Providing other assistance as necessary



Ask Questions!

The OBB Access SSI/SSDI team is available to support you. Please be in touch if you have any questions or concerns: ssidata@ohiofoodbanks.org

