

MODULE 8E Advocate Advanced Topics

SPECIAL SUBJECTS

L4 Understanding SSA Forms

You may have discovered that Social Security uses a multitude of different forms in the disability process. No one should spend a lot of time trying to learn forms. By virtue of practice, you'll automatically be exposed to the most commonly used forms. The others will become familiar to you with time.

Do not allow SSA to make you feel less educated because you don't know the name or number of a form. Social Security changes forms often for reasons that are not always obvious or logical. So, to save your sanity on the subject of forms, here are a few suggestions:

All forms supplied by SSA have instructions. These instructions will show you exactly what the form is for and how to use it.

If a form is outdated, use it anyway. If SSA refuses to accept the form because it is outdated, make sure they provide you with its updated replacement.

In most instances, SSA must accept a letter in place of a "request" form. A request form is a category of forms that request an activity from SSA. For example, a "request for reconsideration" form requests that SSA initiate a reconsideration of a previous denial decision. SSA cannot legally ignore the request if presented in a letter. However, this will not stop SSA from wasting time by sending you the proper form for completion. If this occurs, fill out the form and return it as instructed.

Understanding your objective makes it easier to identify the right form.

Every SSA form has a purpose. However, it can be difficult to know what form is appropriate in what circumstance. It is much easier to play it by ear. If you want to request a reconsideration of a previous denial decision and you don't know which form to use, simply ask SSA or visit their web site. If this is too much, simply write a request cover letter as indicated in your course.

Don't let the forms game drive you crazy. Challenge SSA to provide the proper forms and never allow them to refuse your request for forms. If a Social Security employee tries to refuse your request for a form, ask to speak to a supervisor. Make the request directly to the supervisor and be sure to explain why you need it. If the supervisor refuses, point out that all forms are in the public domain. If he again refuses, then you may need to make a formal complaint to your local Congressional or Senator.

SSA hates these types of complaints! Every time we use it, the issue is usually resolved within days. Don't abuse this approach. Use it only when you feel that SSA's actions are preventing you from providing a quality service to your client. Always present the issue in terms of how SSA's actions are hurting the client, not your business. SSA could care less about your business. However, SSA is directly responsible for making sure that the client gets a fair review of his case. Play on this issue and you will almost always get what you want.

