

Tips and Best Practices for Appointed Representatives

February 2025



Securing today
and tomorrow

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Representative Registration

- Effective September 30, 2024, **all** representatives who want to establish a new appointment on any claim must register with us using [Form SSA-1699](#) before we can accept and process their appointment. This requirement even applies to non-attorneys not eligible for direct payment and representatives who do not want direct payment.
- Individuals who wish to be designated as an entity's Point of Contact (POC) must also register using Form SSA-1699, regardless of whether they ever intend to be appointed as a representative.
- Registration is a **one-time process**, but periodic updates may be needed if your information changes. It is your responsibility to keep your information up to date. Be sure to let us know of changes in your personal information timely to avoid potential delays in processing your appointments, receiving notifications, or fee payments. In addition, failure to timely advise us of certain changes (e.g., suspensions, disbarments, disqualifications, or convictions) by updating Form SSA-1699 or submitting the information in writing may result in a referral for potential administrative sanctions.
 - » Do not contact Disability Determination Services (DDS), the local field office, or any other SSA office to request corrections, updates, or other changes to your registration. These changes must be made using the Form SSA-1699.
- Allow 2-3 weeks for the processing of your registration.
- Fax the completed form to 1-877-268-3827. You can find information about registration in POMS [GN 03913.001](#).
- Eligible for Direct Payment Non-Attorneys (EDPNA):
 - » If you are an EDPNA or interested in the process, visit our webpage at <https://www.ssa.gov/representation/nonattyprep.htm>. We regularly update it.
 - » Use our electronic records. You are eligible to gain access to the electronic claim(s) file once you are registered and meet the criteria discussed in the next section.

Use Our Online Services

- Visit our website at <https://www.ssa.gov/representation/index.htm> to:
 - » Read News Updates, get information related to representation, find answers to Frequently Asked Questions and subscribe to email updates.
 - » Submit your appointment and fee agreement electronically and conveniently using our [e1696](#) and [e1693](#) portals.
 - » Locate available agency [Forms](#).
- Learn about our latest information and announcements at: [U.S. Social Security Administration - YouTube](#)
- Review the hearings and appeals level Best Practices for Claimants' Representatives [webpage](#) for comprehensive information on representation during the hearings and appeals process.
- If you are appointed on a case as the principal representative, you are eligible to enroll for claimant eFolder access and other online services. All registered representatives may be eligible to access our electronic records, whether eligible for and seeking direct payment or not. However, additional steps are necessary, as explained below.
- Online Service Portals:
 - » [Appointed Representative Services \(ARS\)](#):
 - View electronic folders for your active cases;
 - Download detailed status reports for all your pending and recently closed cases; and
 - Upload documents without a barcode.

- To access ARS:
 - To enroll, you must have been appointed on at least one claim pending at the hearing or Appeals Council level, either now or in the past.
 - To request enrollment, contact any hearing office and request an invitation be mailed to you. Follow the instructions on the invitation to continue the process.
 - You must enroll through this process even if you are already registered with us.
 - While overall enrollment is one-time, access to each specific claim folder is dependent upon you having an active appointment with that claimant and terminates when the representation ends.
 - Visit [Appointed Representative Services | Office of Hearings Operations](#) for more information on enrolling in ARS.
 - Call 1-866-691-3061 if your ARS account is suspended.
- » [Electronic Records Express \(ERE\)](#):
 - Upload disability claim related documents online. Remember, representatives must submit evidence electronically in any claim for which they request direct payment and use of our ERE portal fulfills this requirement. See [GN 03970.010](#).
 - To access ERE:
 - Get started by calling the Social Security Electronic Records Express Help Desk at 1-866-691-3061 or by email at: electronic-records-express@ssa.gov
- » [Appeals and Appointed Representative Processing Services \(AARPS\)](#):
 - View details of current claimant appointments (which is a way to verify if the [Form SSA-1696](#), *Claimant's Appointment of a Representative*, has been processed).
 - View fee payment information for each claimant.
 - Check the status of claims and appeals. For example, level (i.e., initial, reconsideration, Hearing, or Appeals Council) and processing or completion status.
 - Check the status of claims and appeals.
 - Create and print reports of selected appointment and fee records; and
 - Review business information, including affiliations and payment method.
 - To access AARPS:
 - To enroll, you must be in good standing (i.e. not suspended or disqualified from representing claimants) and registered with us using Form SSA-1699, *Representative Registration*.
 - By selecting [AARPS Online](#), you will be directed to the AARPS Sign-In Page. Here, you will need to enter your Login.gov, ID.me or Social Security username credentials. Select the links below for login assistance:
 - * [Login.gov](#)
 - * [ID.me](#)

Direct Payments And Assignments Of Direct Payments To Entities

- You must tell us as soon as possible if you want to assign direct payment of your fee to your affiliated entity.
 - » You must first affiliate with the entity to which you want to assign direct payment by submitting a new or updated Form SSA-1699 and listing that entity in Section V of the form.

- » Your affiliated entity must also register using [Form SSA-1694, Entity Registration and Taxpayer Information](#), before we can process your request to assign direct payment. We will not process a request to assign direct payment to an unregistered entity (or an entity that has not updated their registration with payment information since September 30, 2024).
 - Fax the Form SSA-1694 to 1-833-597-1429. Keep in mind this fax number is not the same as the number to which the Form SSA-1699 is faxed.
- » Use Section 5, Parts B and C of the current version of the Form SSA-1696, *Claimant's Appointment of a Representative*, to link the particular case with the correct affiliated entity and request assignment of direct payment to that entity.
- » If you previously assigned direct payment of your fee to an entity and now wish to waive your fee or direct payment of it (whether you are withdrawing from the claim or not), you must first rescind the assignment before we will accept the waiver.
 - Submit an updated Form SSA-1696 with "Rescission of prior assignment" selected in Section 5, Part C to rescind.
- » You may assign direct payment of your fee to only one entity per case. We do not allow partial assignments.
- You may also affiliate with an entity for tax purposes, even if you do not assign direct payment of a fee to that entity.
 - » To affiliate with an entity generally, list that entity in Section V of Form SSA-1699. A representative may affiliate with one or more entities using that form.
 - » Once you have affiliated with an entity using Form SSA-1699, you may affiliate with that entity on a particular claim by listing that entity in Section 5, Part B of Form SSA-1696.
- If you do not want to designate an affiliate entity for a claim, or do not qualify for or seek direct payment, mark "no EIN" in Section 5, Part B of Form SSA-1696 and do not fill out Section 5, Part C.

Tips To Facilitate Processing Of Appointments

- To establish an appointment, you or your client must submit the current version of Form SSA-1696 (Form SSA-1696 12-2024 UF or later). Each representative must submit their own Form SSA-1696 as the information we collect is unique to each representative.
 - » Remember, we cannot process a Form SSA-1696 unless there is a pending matter before us. This includes a properly signed and filed application for benefits or a filed appeal.
 - » The claimant and representative, including attorney representatives, must sign the SSA-1696 either using the paper form, a fillable PDF, or the e1696.
 - » Be sure to look out for the confirmation notices but allow time for processing. Check your appointment online on our AARPS portal or wait 30 days before contacting us to follow up on your appointment.
 - When confirming the appointment using AARPS or the notice, ensure all information is accurate (i.e., EIN, assignment, etc.)
- When contacting us to check on an appointment, you must contact the office that is handling the claim. This will be your client's servicing field office or workload support unit (WSU) that is listed on the claims receipt. You can also find your client's servicing field office's telephone number using our [Social Security Office Locator](#).
 - » Before following up with the SSA field office or WSU for initial claims, ensure the claimant has attested to the application with us or has signed and returned the application (SSA-L2) that we mailed to them.

- DO NOT submit your Form SSA-1696 or other representational documents to your local DDS office. DDSs do not process SSA-1696s, fee agreements, or changes to personal information for you or your client. Also, you should not contact them regarding the status of your appointment, fee agreement, or representational documents because they do not have this information.
- If you have trouble contacting the servicing office or have not received a notification or a response, please contact the appropriate [Regional Communications Director](#).
- DO NOT send us multiple submissions of the same Form SSA-1696. Duplicate submissions do not increase the priority of your initial submission but rather cause delays as the agency must review each submission.
- Ensure that the Form SSA-1696 clearly identifies the principal representative when a claimant appoints more than one representative.
- If you verify that a Form SSA-1696 appointing you as the principal representative is in the claimant's electronic folder, but you are not receiving copies of notices sent to your client, contact the servicing field office/WSU to confirm that your appointment information is up to date, and we have you listed as the principal representative.
- You can help avoid unnecessary delays with processing claims by:
 - » Making your client aware that SSA may need to contact them directly by phone or mail. For example, SSA will still require a proper applicant's signature if an application is submitted by a third party.
 - » Encouraging your client to respond promptly to SSA requests to confirm we have the correct contact information in our records.
 - » Allowing 30 days before calling to check on the status of the claim or forms.
 - » Submitting forms only to the office handling the claim and only one time to avoid duplicating necessary actions by SSA.

Signature Requirements And Initial Claims Packages

- Claims filed by a third-party via iClaim are considered protective filings. An application is not considered complete until it is signed by a claimant or proper applicant. SSA may also contact the claimant to obtain attestation.
 - » A faxed copy of a signed application can only be considered a protective filing.
 - » Attestation may be completed by telephone or by scheduling an appointment with the SSA office of jurisdiction found on the claims receipt.
 - » IMPORTANT: Sending a claimant to the SSA office without an appointment can result in substantial wait times and the office may not be able to assist the claimant on that day.
- Effective December 9, 2024, if a new representative is being appointed, both the claimant and the representative (both attorneys and non-attorneys) will be required to sign the Form SSA-1696.
- Hearing offices no longer allow verbal attestation of the representative's appointment at a hearing. Representatives must be registered with the agency and must submit their validly executed SSA-1696 prior to the claimant's hearing to appear on the claimant's behalf. For hearing appearances by audio and online video, hearing offices will not contact representatives who do not have a valid appointment on file prior to the scheduled hearing.
- Commercial Product Alternative Signature Process (CPAS)
 - » The following agency forms will be accepted with CPAS:
 - [SSA-1696](#) *Claimant's Appointment of a Representative*
 - [SSA-1693](#) *Fee Agreement for Representation Before the Social Security Administration and other written fee agreements*

- [SSA-16](#) *Application for Disability Insurance Benefits (DIB)*. This includes the online version of the SSA-16 application sent to the claimant with the SSA-L2 cover letter after a third party completes and submits the DIB/SSI internet claim.
- [SSA-8000](#) *Application for Supplemental Security Income (SSI)*
- [SSA-8001](#) *Application for Supplemental Security Income (SSI) (Deferred or Abbreviated)*
- [SSA-820](#) *Work Activity Report – Self Employed Person*
- [SSA-821](#) *Work Activity Report-Employee*
- You must ensure that the commercial product used:
 - » Affixes a signer’s name on the signature block of the form,
 - » Affixes the date and time the document was signed, and
 - » Is capable of generating an audit trail and maintaining a digital certificate that confirms the following:
 - The document was signed using a commercial product,
 - The signature details, i.e., name of the person(s) who signed the document, date the document was signed, and time the document was signed,
 - Email address(es) and IP address(es) associated with each signature,
 - Whether the document was changed after signature, and
 - An identifier that connects the audit trail to the signed document to which it applies.
- You must maintain the original electronic certificate for at least three years from the date you submit the form or writing to the agency and must produce the unredacted certificate in its entirety if requested. In the event of signature repudiation, the submitter may also be asked for additional information as appropriate.
- The forms and writings listed above signed with a CPAS may be submitted using any method currently accepted for the same forms or writings when signed with a wet (pen and ink) signature.
- A complete claims package includes a:
 - » Properly signed or attested application. For third-party filed iClaims, this is the SSA-L2 package mailed to the claimant. They must return the entire document, not just the signature page.
 - » Complete [Form SSA-3368](#) or [Form SSA-3820](#).
 - » Properly signed or attested [Form SSA-827](#). If your client completes a paper Form SSA-827, ensure information at the top of the form is complete and the date is filled in, along with the signature. A paper version is automatically mailed as part of the SSA-L2 package.
 - » Work Activity Report (Form SSA-821 or Form SSA-820) if the claimant has worked since their alleged disability onset date.
 - If the applicant is currently employed, provide details about their current work activity. This includes any special conditions related to the employment such as the person working fewer hours or receiving help doing the work.
- Ensure the claimant connects with SSA to attest their paperwork or signs and returns the complete package that is automatically mailed to them.
 - » The Form SSA-1696 or e1696 cannot be processed until the application is properly attested or otherwise properly signed.
- Common reasons for re-contact include:
 - » Medical release form (Form SSA-827) not received.
 - » Incomplete work or medical activity information on the disability report, SSA-3368 or SSA 3820; and
 - » Unsigned forms.

Fees – Fee Agreements, Fee Petitions, Direct Payments, And Withdrawals

Submitting Your Fee Agreements

- Familiarize yourself with our policy in [GN 03920.016](#) on Payment of Representative's Fee, and [GN 03920.050](#) on Releasing Withheld Funds for Representatives' Fees.
- Use the e1693 to submit your fee agreement online or the Form SSA-1693, *Fee Agreement for Representation Before the SSA*, when possible, for streamlined processing.
- For independently drafted fee agreements, ensure the fee agreement meets the conditions for fee agreement approval outlined in [GN 03940.003](#).
- Ensure all representatives who have not waived their fees (regardless of whether they are affiliated with the same entity or different entities) sign the same fee agreement.
- Submit your fee agreements as early as possible in the process. Fee agreements must be received prior to the first favorable determination or decision that you worked towards achieving.

Submitting Your Fee Petitions

- Use our [Form SSA-1560](#), *Petition for Authorization to Charge and Collect a Fee for Services Before the SSA*, when possible.
- Submit your fee petition as soon as all services have been completed if you are not seeking approval using the fee agreement process or we disapproved your fee agreement. If you intend to file a fee petition and your services end, you do not need to wait for the notice of award before filing your petition.
- On your fee petition, clearly document your services provided and hours worked.
- You must send a copy of the submitted fee petition document to the claimant.
- For representatives requesting direct payment, ensure you file your fee petition (or intent to file a fee petition) within 60 days of the first favorable determination or decision made on the claim. Fee petitions received after this time may not be eligible for direct payment. Complete all SSA forms in their entirety. Missing information will cause delays.

Inquiries About Direct Payment Of Fees

- Check AARPS on the status of your fee and wait until you receive the notice of award before contacting us about the status of fee payments. Premature inquiries slow down the processing of payments. Fee payments are made after awards are processed, which is indicated by the notice of award.
- Contact the Representative Call Center (RCC) at 1-877-626-6363 to be routed to the appropriate Processing Center (PC) of jurisdiction for issues involving:
 - » Claims pending or processed by a PC (including fee payment questions or status), and/or
 - » Questions or issues involving IRS Form 1099-MISC or 1099-NEC.
- Additional PC guidance can be found here:
 - » [Representing Social Security Claimants-Processing Center Telephone Contact Information for Claimants Under Age 54](#)
 - » [Representing Social Security Claimants-Processing Center Telephone Contact Information for Claimants Age 54 and Older](#)

Withdrawal Of Representation

- Use [Form SSA-1696-SUP2](#) or an equivalent writing to withdraw an appointment. You can also use this form or other equivalent writing to tell us whether you will be waiving your right to a fee or whether you will file a fee petition.



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Social Security Administration

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