



Appointed Representative Best Practices and Tips

We value our relationship with the appointed representative community and provide the following recommended best practices for use when conducting business with the agency.

Online Services

- Become familiar with our website at www.socialsecurity.gov/representation and sign up for email updates to stay informed of developments that affect representatives.
- Use Electronic Records Express (ERE) at www.ssa.gov/ere to expedite the disability decision process. Ask the Disability Determination Services (DDS) or the Office of Hearings Operation (OHO) handling your client's claim to give you the barcode required for submitting records online.
- Request access to your client's electronic folder for cases pending at the hearing and the Appeals Council level by visiting: www.socialsecurity.gov/representation. eFolder access provides uploading and downloading capabilities for electronic claims.

Submitting Documents

- Avoid duplicate submissions. Use one channel only (online, mail, or fax to submit appointment-related forms and/or other evidentiary documents to prevent delays.
- Include or resubmit a notice of appointment or fee payment forms only if you want to give us new or updated information. We will notify you when we process the document. When you receive our acknowledgement notice, review it for accuracy. Contact the servicing field office if corrections are needed.
- When requesting fee authorization, we encourage you to use the SSA approved forms, the SSA-1693 for Fee Agreement and the SSA-1560 for a Fee Petition. These forms include all the information we require to process payments. They also include a section to declare any fee payments you have received or will receive from a third-party for the services provided on the claim. Letting us know about third party payments in advance helps us in our fee authorization process by ensuring we approve all fees paid to you in support of the claim. If you do not use our forms for fee authorization, you should still provide us with this information with your fee authorization request to ensure compliance with our fee approval rules and regulations.
- Limit any non-electronic submissions (fax up to 30 pages and mail over 30 pages) to the servicing field office.

Initial Claims

- File the initial disability claim online. For helpful information on filing a complete online application (iClaim) see **Apply Online for Disability Benefits. Important:** Unless your client is with you while completing the online application, and able to click and sign the

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application, you must select “I am helping someone who is not with me; and therefore, cannot sign the application at this time.”

- To expedite processing of the iClaim complete the SSA-3368, Disability Report, before you file your iClaim. You should have your claimant’s medical references and disability-related information on hand when completing the SSA-3368.
- Provide the SSA-820, Work Activity Report – Self-Employed Person, or SSA-821, Work Activity Report – Employee, for all work done after the alleged onset date, as appropriate. Find helpful information for filing complete online applications at [Apply Online for Disability Benefits](#).
- Ensure your client has attested or personally signed the application with pen and ink. We do not accept electronic signatures for claimants This includes the click-and-sign signature for Internet filers.
- Submit Worker’s Compensation information as soon as possible to expedite case and fee payment.
- Mail **or** fax your notice of appointment (i.e., SSA-1696 Appointment of Representative or equivalent in writing) and the SSA-1695 Identifying Information for Possible Direct Payment of Authorized Fees to the servicing field office, as determined by the claimant’s zip code at www.socialsecurity.gov/agency/contact/. **Submit these appointment documents with the claim or after the claim is filed, never before filing the claim.**

Reconsideration and Hearing Requests

- If you are registered with us, you must file your appeal online via our [Disability Appeal portal](#) and be ready to complete and submit the SSA-3441 Disability Report – Appeal online with the iAppeal request.
- Submit medical documentation, appointment forms and other documents electronically with the online appeal request (iAppeal).
- If the appeal was not filed timely, include a statement with the reason, why you or your client files the appeal after the 60-day appeal period. If we establish “good cause”, submit a new notice of appointment if you want to represent or continue representing a client on the appeal. If we cannot establish “good cause for late filing,” we cannot process the appeal and your client will have to file a new claim.

Status Inquiries and Field Office Contacts

- Be prepared to answer personally identifiable questions when you call our field offices, so that we can confirm your identity and protect the claimant’s privacy.
- Know that for privacy and security reasons we are unable to respond to email inquiries.

Representative Issues

- We only recognize individual representatives, not entities.

- When a claimant appoints multiple representatives (whether the representatives work for the same or different entities or for themselves), all must sign a single fee agreement. They have to submit each their own fee petition, if it becomes necessary.
- We only accept appointment and fee documents, such as withdrawals and fee petitions, signed by the appointed representative submitted by the appointed representative.
- Be aware that when multiple representatives are involved, additional time may be needed to manually compute the process the individual fee payment.
- Secure and submit a new notice of appointment from the claimant, with a current date and signature, when changing representatives during the administrative review process.
- Let us know about changes in your registration information (updates to name, address, affiliation, or payment method) by completing a paper Form SSA-1699 Registration for Appointed Representative Services and Direct Payment and faxing it to the dedicated OEO fax number for the SSA-1699 is 1-877-268-3827. If you are an EDPNA, submit your changes also to our contractor.

Submit a new 1695 to the servicing field office for each of your pending cases, whenever there is a change in your personal, banking information or affiliation.