



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.ssa.gov/representation and sign up for email updates to stay informed of developments that affect representatives. We added a subscription button to this page for your convenience.
- We added the new [Online SSA-1696 Claimant's Notice of Appointment \(e1696\)](#) to the representation website. It offers a fast, efficient, and secure method for completing, signing, and submitting your appointment electronically by providing yours and your claimant's email addresses and following a few simple directions with no need for face-to-face communication. We continue to accept submissions via mail, fax, e-Fax, or uploaded through the ERE and iAppeals portals.
- Use Electronic Records Express (ERE) at www.ssa.gov/ere to help 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.ssa.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, Form [SSA-1693](#) (Fee Agreement for Representation Before the Social Security Administration) and Form [SSA-1560](#) (Petition For Authorization To Charge and Collect A Fee For Services Before The Social Security Administration). 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 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 and submit the [SSA-3368](#), Disability Report, with 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](#).
- Submit Worker’s Compensation information as soon as possible to expedite case and fee payment.
- Mail, eFax, upload, or electronically submit your written notice of appointment (e.g., SSA-1696 Claimant’s Appointment of Representative or any other writing) to the servicing field office, as determined by the claimant’s zip code at [Social Security Office Locator](#). There you can find special fax numbers that allow you to fax your documents directly to our processing system. Complete section 5 for direct payment only if you qualify as either an attorney or Eligible for Direct payment non-attorney (EDPNA) representative. **Submit the appointment document with the claim or after the claim is filed, never before filing the claim.**
- **Submit one SSA-1696 per representative. With the incorporation of the RepID into the SSA-1696, we can no longer accept multiple names on a single notice of appointment.**

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 inquiries by email.

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. Otherwise, we will disapprove the fee agreement and ask each representative to file a fee petition.
- We only accept appointment and fee documents, such as withdrawals and fee petitions, signed and submitted by the appointed representative. However, withdrawal and waiver of fee are two separate issues. If you want to withdraw your representation, do not forget to inform us, if you seeking a fee for your services or intent to waive it. We provide Form [SSA-1696-SUP2](#), Representative's Withdrawal of Acceptance of Appointment for your convenience.
- Be aware that when multiple representatives are involved, additional time may be needed to manually compute the process the individual fee payment. If you decide that you wish the fee paid to only one representative to expedite the fee payment, you can accomplish this by having all but one representative withdraw and waive the fee. You must complete this withdrawal and waiver process prior to our first favorable determination. Representatives who did not waive their fee and who wish to receive a fee, must either sign on a single fee agreement (to receive equal shares), or each representative must submit a fee petition.
- We only accept appointment and fee documents, such as withdrawals and fee petitions, signed and submitted by the appointed representative who provided the representational services.
- 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 SSA-1696 (Page 5) with updated direct payment information to the servicing field office for each of your pending cases, whenever there is a change in your personal, banking information or affiliation. If you complete **your personal (RepID) and the claimant's (SSN) information** on the top, you only need to submit page 5 with your updates. It is not necessary to submit the entire form.