Real Tactics 4 Disability Claims

Checklist of Information Required to File for Social Security Disability and Medical Records Tracking

How to file (check **ONE** and follow through):

<u>I am filing online</u>: click on this <u>link</u> **Important: Do not file online if your claim is for SSI-Supplemental Security Income*.

*Learn more at: http://realtactics4disabilityclaims.com/supplemental-security-income/

Careful: This is a two part process. If you reach a screen with a "reentry number" please save that number and click next. You will then start part 2. Failure to do so will result in a denial of the claim for incomplete filing. The reentry number allows you to go back if you get tired and want to finish a little later or the next day.

I am filing in person: Locate your nearest office through this link

Remember: some offices can be as bad as the DMV-Use caution on how you appear in person. They SEE you and make notes on how you appear and how you behave while waiting!

_I am filing over the phone (Recommended) - Call 1-800-772-1213

<u>Psst</u>: they have to do all the typing for you-Great for those claimants who can't sit for a long time or have issues with the hands. **You can do this lying down in your bed!** <u>Isn't that nice?</u>

When to file:

My post about "<u>How do I know I Qualify to File For Disabilty?</u>" will explain everything you need to know about the proper time to file your case but basically the rule is:

Your condition has lasted or is expected to last at least 12 months or more.

The clock starts ticking from the day you stopped working and NOT from the date of diagnosis (unless they coincide to be the same). So for example: If you stopped working on August 5, 2015, you can file on August 5, 2016¹

¹This is the rule for most cases. If you have not worked for <u>more than 5 years</u>, it gets a little trickier-You <u>must</u> consult an attorney for this particular situation.

Complete these items below:	
Date I stopped working:	
Date I can file:	

List of Doctors:

Name	Address/Phone Number	Type of Doctor	This Doctor Treats Me For:
Dr. Super Man	123 1 st Street, Crypton, MO - 222-123-44-555	Endocrinologist	Diabetes

Treatment:

For each doctor you listed above, fill out the form below. This list will help you understand

the time line of your treatment and will help you make sure you are not missing any available record of your visits with each doctor you have (i.e. no gap in treatment).

This information will be required throughout the case even if Social Security orders records directly with your doctors. Always request a copy for your records since Social Security will not share these with your attorney or you. Put them in a folder separated by type of doctor. It will make things easier for you to identify who you are seeing and how long, and keep track of your treatment.

Print as many pages as you need. Also use a pencil so you can make changes to the form as they are updated.

Doctor	Treats Me For	Type of Treatment Done	Treatment from/To	Last Visit	Ordered Records ?	Got Them!
Dr. Super Man	Diabetes	Medications, nutrition, blood work, MRI	2/15/12- present	Sept 1 2016	copy of recs from Aug 2015 to present	Yes

Notes and R	eminders:				
	 	 		 	
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You can staple an envelope here with the flap outwards and you can save all business cards from each doctor you have. This is a great way to have the information you need in an easy spot to find them. Those pesky business cards are so easy to lose!

(Envelope here)