

# Disability claims

## Disability Claim Step-by-Step Checklist

### Step 1: Gather Medical Documentation

- Collect all relevant medical records (doctor's notes, hospital records, test results).
- Obtain functional assessments and disability evaluations from healthcare providers.
- Request any psychiatric or therapy notes that support disability needs.

### Step 2: Complete the Application

- Fill out the Social Security Disability Insurance (SSDI) or Supplemental Security Income (SSI) application.
- Include detailed descriptions of physical and mental health limitations.
- Provide contact info for healthcare providers.

### Step 3: Submit Application and Follow-Up

- Submit the application online, by phone, or in person at your local Social Security office.
- Keep copies of all submitted documents and forms.
- Note the application confirmation number for tracking.

### Step 4: Attend Medical Consultations and Exams

- Prepare for and attend any required consultative exams ordered by Social Security.
- Keep appointments and follow provider instructions.

### Step 5: Monitor Application Status

- Regularly check application status online or by phone.
- Respond promptly to any requests for additional information.

### Step 6: Prepare for Possible Appeals

- If initial claim is denied, don't panic—appeals are common.
- Understand the appeals process: reconsideration, hearing, Appeals Council, Federal Court.
- Seek assistance from a disability advocate or attorney if needed.

### Step 7: Receive Decision and Plan Next Steps

- Review the decision letter carefully.
- If approved, understand benefit amounts and start dates.
- If denied, review denial reasons and decide on appeal.

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## Tips to Manage Fear and Stay Organized

- Break the process down into these small steps.

- Ask for help from case managers or advocates at any point.
  - Keep a dedicated folder (physical or digital) with all paperwork.
  - Take it one step at a time and celebrate small victories.
  - Remember, many people get approved after initial denials — persistence pays off.
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