# Your Disability Application Preparation Organizer

Use this optional organizer to prepare for an SSA application or conversation. Complete your notes on your own copy. It does not file a claim or replace an SSA form.

> **Missing information does not mean you must wait.** SSA's Adult Disability Starter Kit says not to delay filing because information is missing. SSA can help you get it.

## Preparation Checklist

- ☐ Read SSA's application instructions and any letter about your appointment or requested documents.
- ☐ Locate identity and family information for the official application. Keep sensitive identifiers elsewhere.
- ☐ List healthcare providers, their locations and contact details, and the dates you saw them.
- ☐ List medicines and medical tests, including the provider who prescribed or ordered each one.
- ☐ Prepare job dates, hours, pay and actual duties for the period requested.
- ☐ Note education, training and other disability-benefit information that applies to you.
- ☐ Check SSI income, resource and living-arrangement documents if you are also applying for SSI.
- ☐ Write down missing information and questions, then check your official next step.

A checked box means you have addressed a preparation task. It does not mean you qualify for benefits or that SSA has received an application.

**Protect your information:** Do not write Social Security numbers, bank account numbers or passwords on this organizer. Store any completed medical or work notes safely. Do not send this worksheet to this website.

Online guide: Disability Application Checklist: Documents to Prepare

# Your Medical-Information Notes

Gather details you know and records already in your possession. SSA's starter kit says you do not need to request or pay providers for medical records you do not already have. Follow any specific request sent to you.

## Healthcare Providers

Include the clinic or hospital location. Mark uncertain dates as uncertain. Print another copy if needed.

| Provider and Clinic | Address and Phone | First / Most Recent Visit |
|---|---|---|
| | | |
| | | |
| | | |

## Medicines

| Medicine | Reason, if Known | Prescribing Provider |
|---|---|---|
| | | |
| | | |
| | | |

## Tests

| Test | Ordering Provider | Date / Planned Date |
|---|---|---|
| | | |
| | | |
| | | |

These are preparation notes, not treatment instructions. Use the official application or requested form for the information SSA needs.

# Missing Information and Next Steps

List a question, the person or office you can ask, and the next action. Keep estimates clearly labeled. Do not postpone contacting SSA just to finish this page.

| Question or Missing Item | Who Can Help? | Next Action / Follow-Up Date |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |

## My Official Next Step

For example: contact SSA about a missing item, attend an appointment, or complete the official application. Use the instructions given for your own case.

## Source Guides

SSA Adult Disability Starter Kit — medical contacts, preparation and missing information.

SSA Online Adult Disability Application Checklist — information requested for the online application.

SSA SSI Document Guide — additional documents when SSI applies.

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