

# Applying For and Getting Social Security Disability

By Grace Anne Henry  
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Dear Reader,

This is written only as a guide with no guarantee that your claim will be approved right away, or at all. It is a means of helping you get your paperwork organized for an effective presentation to the Social Security Office. It is based on successfully going through the process and receiving approval the first time.

Some information in this paper refers to my specific case based on a rare eye disorder I have, but it can be applied to your situation. Also, when going through this paper, don't just do what is here. If the paperwork from the Social Security Office asks for different or other information, go first by what is asked of you, then use this paper as a guide.

This paper takes you through all the stages of applying. Again, it is based on my personal experience with the Social Security Office.

I'm warning you now, applying for Social Security Disability (SSD) takes organization, patience, and the constant thought that you will get the Social Security Disability that you deserve. It's a lot of paperwork, but it may help you get your SSD a lot sooner because you won't have to continuously be trying to find more information they want. It also shows them that you know what you're doing and you're a no-nonsense person ready to get the job done.

I wish you the best of luck in applying, but you will need more than luck. You need to be mentally ready to devote a lot of time to getting 'your ducks in a row'. This is not always easy because you are also dealing with the frustrations of living with your disability. Keep at it.

If this helps you (and I pray it does), please share this information with anyone you know that is in need of guidelines for applying for SSD

Grace Anne Henry

## Working Through The SS Fears

I hadn't planned on leaving my job this soon, but my eyes just couldn't handle the fluorescent lighting, computer, and print that seemed to become smaller each day. I was scared about applying for disability. I've heard things like:

- a. they'll do everything to deny your claim
- b. they almost always deny a claim the first time, then you will have to appeal.
- c. the process could take one to two years or more to get it.

Yes, I was scared about embarking on this bleak-looking road. Because I was a Department of Defense employee, the Human Resource Office (HRSC) helped me in starting the paperwork process with the transition from working to not working. This was a big help, but my first blow came when I was told that it was useless to apply for Social Security while I was still working. **The Social Security Office tends to look at that as, 'if you're working, you can't be disabled'. This is Rule #1 to keep in mind.** So leaving my job was first, but then I couldn't function at my job any longer anyway.

## SS APPOINTMENT BY PHONE OR IN PERSON

Once I began my leave without pay pending disability approval, I called for an appointment with the Social Security Office. I was given two choices: I could apply by phone, or, I could make an appointment to see someone there in person. I chose the latter for several reasons:

a. I personally wanted to see (the best I could) who I was initially working with. I wanted to pick up any feelings from them, as well as have my husband catch their facial expressions and manner. In short, I wanted to personally get a feel for the overall response I would get.

b. I wanted to be able to HAND my paperwork to SOMEONE.

c. If what I submitted generated any questions, I wanted to be able to get it answered then.

I strongly recommend going in person. It does take more time to go to their office, fill out more paperwork, and be interviewed, but in the long run it will save time. They would immediately have the information without the delay of going through the mail and wondering when it would get there, and if someone actually input the information for processing.

Also while you are at their office, you may be told to go to one of their doctors for examination. You can deny doing this, and here's why. According to the book *Disability Evaluation Under Social Security*, page 5,

*“A treating source is a claimant’s own physician, psychologist, or other acceptable medical source who has provided the claimant with medical treatment or evaluation and has or has had an ongoing relationship with the claimant. The treating source is usually the best source of medical evidence about the nature and severity of an individual’s impairment(s).”*

You may also be asked for a mental evaluation as well as a medical evaluation. (I did not have this experience, but an acquaintance of mine did). She states that according to *Social Security – A Special Examination is Needed for Your Disability Claim* pamphlet, page 2, “*The examination will be performed by your doctor or another doctor*”.

If this situation occurs, request a copy of that pamphlet or book from the Social Security Office if you do not already have it. Quote this if you decide to deny being examined by their doctors.

Also, I would suggest going online to <http://www.ssa.gov/> for other pamphlets that could be of help to you.

## RECEIVING THE PACKET

Once I set up the date for my interview, I then later received a packet in the mail which had multiple lists of what to submit. It stated that it was important to complete and return before the appointment. I didn't return it, but instead took it with me for my appointment which didn't seem to be a problem. (My appointment was the week after I received the packet so there really was no time to mail it.) If it can work out, take it with you. Again, by delivering it in person, you know they got it.

The appointment consisted of two parts: SSI (Supplemental Security Income) and SSD (Social Security Disability). I found it easier to initially make up a pocket folder for each doctor, hospital, etc. **Be sure to make copies of everything you submit. This is big Rule #2.**

I created a checklist (Samples #2 and #3) based on what they needed, which consisted of the following:

- a. Bank statement or checkbook for the account where you would like the payments deposited.
- b. Social security number
- c. Proof of age: your birth certificate – **original** – they will make a copy and return it to you on the day of your appointment. **NOTE: Social Security must have everything in originals. This is big Rule #3.**

- d. Proof of marriage/divorce
- e. Proof of medical evidence
- f. Proof of SSI income/resources.

**NOTE:** When you apply for SSD, you also apply for SSI (Supplemental Security Income). It's part of the application process. However, if you own a home or even one vehicle, you probably won't be approved. But that's okay. Do it anyway. You will receive a letter stating you do not qualify. At least you will have that as documentation.

- g. Questionnaire – questions you will be asked.

## ANOTHER PACKET IN THE MAIL

Just when I thought I was finished filling out tons of forms, I received another large packet in the mail from the Social Security Office. This consisted of:  
a green booklet  
a gold booklet, and  
six forms (SSA-827) which was the authorization for them to request any further information from doctors, etc.

The green booklet is the Disability Report for an Adult, SSA-3368-BK. There were nine sections on ten pages. Take each of these sections and gather all your paperwork, as well as type up your information.

Section 1 – Info about the disabled person

Section 2 – Your illnesses, injuries or conditions and how they affect you

Section 3 – Information about your work

Section 4 – Information about your medical records

This includes names, addresses, telephone numbers of doctors, hospitals that treated you and the dates of treatment. **My advice here is, don't leave out any doctor even if you've only seen him once, or even if he/she was not the right doctor to see for your condition. This is Rule #4.** My first doctor was a neurologist who felt I had Hemifacial Spasms (HS) and referred me to another doctor who dealt with that. I put this doctor's name down and noted after his phone number that this was not his field & referred me to Dr. Soand So.

Section 5 – Medications

Section 6 – Tests

Section 7 – Education/Training information

Section 8 – Vocational rehabilitation information

Section 9 – Remarks (a continuation sheet for added info)

The gold booklet is the Work History Report, SSA-3369-BK.  
There were three sections on eight pages.

- Section 1 – Information about the disabled person
- Section 2 – Information about your work (jobs held in past 15 years)
- Section 3 – Remarks (a continuation sheet for added information)

When all of these were filled out, I made copies for my records and mailed them to the SS Office. **This is Rule #5 – make copies of anything and everything you send out to anyone.**

Next – you sit and pray it goes through quickly.

## **OTHER RECOMMENDATIONS**

1. Make a cover sheet for each doctor. On it put the doctor's name and then list each thing submitted in that packet. Give the date of each item and how many pages it consists of. (See sample #1)
2. Create a cover sheet for Supporting Documentation (See Sample #4). On this, list, each and every paper, including a copy of pertinent information taken out of pamphlets from the group(s) dealing with your disability. Be sure to write the name of the pamphlet and the organization that put it out. Include any other pertinent articles or findings.

**CAUTION:** Not everything in the pamphlet needs, nor should be, submitted. If the pamphlet covers more than just your particular disability, don't submit copies of that article. The Social Security Office is not interested in articles on, for instance where injections are given or clinical trials. **REMEMBER: you want to bombard them with plenty of information, but make sure it is relevant and factual for your situation. This is big Rule #6.** It may seem an overkill to 'bombard them' with plenty of information, but what you are doing is giving them every piece of evidence that they might need so that you don't have to keep going back to dig up more information which slows down the process.

3. Create small check off slips for each piece of documentation and paperwork that goes out. On it you write the name of whomever you submitted that particular paperwork to and the date you submitted it. The purpose of this is to track
  - a) that it was given to the right person, and
  - b) the date it was given. You may need this info if follow up calls need to be made.

This page has check off slips for your use. Feel free to make copies of these and use them. Or you can create your own. Attach one to each document you submit.

<b>Date Sent</b>	<b>To Whom</b>

<b>Date Sent</b>	<b>To Whom</b>

<b>Date Sent</b>	<b>To Whom</b>

<b>Date Sent</b>	<b>To Whom</b>

<b>Date Sent</b>	<b>To Whom</b>

Sample #1

**Dr. Some One**

1. Letter dated 10-17-99 [ 2 pgs]
2. Medical Report dated 11-15-99 [ 5 pgs]
3. Letter dated 6-2-00 (limitations) [ 2 pgs]
4. Letter dated 6-2-00 [different from #3] [2 pgs]

This should include every letter written to the doctor and every letter or note received from the doctor. Even if you think it won't pertain or doesn't matter, include it.

Sample #2      With regard to Medical Records, make copies. You don't want to give them your originals.

## **DOCUMENTS FOR SOCIAL SECURITY**

BIRTH CERTIFICATE – remember it must be original. (See page 2)

NAME, ADDRESS, PHONE # OF DOCTORS – ON FORM SSA-3368-BK,  
PGS 4, 5, 9

DATES OF MEDICAL TREATMENT PAST & FUTURE\*

MEDICAL RECORDS      DR. THIS ONE  
                                 DR. SOME ONE  
                                 DR. GOOD ONE

PRESCRIPTIONS FOR DISORDER – FORM SSA-3368-BK, PG 7\*\*

LAST PAY CHECK STUB – PPE 7-1, 7-9, 7-15

MARRIAGE CERTIFICATE

\*It might sound crazy to put in future dates of medical treatments, but this shows the Social Security Office that it is necessary to continue your medical treatment for your disability.

\*\*List everyone one of them exactly as on your prescription bottle. If your doctor tells you that you need to take 2 Tylenol every night, put that down. List the mg (milligrams), and how often you are to take it, as well as any other instructions for use.

Sample #3

DOCUMENTS FOR  
SSI

LAST MORTGAGE RECEIPT

LAST INCOME TAX STATEMENT FOR SPOUSE

LAST BANK STATEMENT

LIFE INSURANCE

AMOUNT LEFT IN IRA (or other investments) (If applicable)

VEHICLE REGISTRATION – (all vehicles)

### Other Supporting Documents

1. BEBRF pages [ 9 pgs]
2. Definition of Functional Blindness [1pg]
3. Blind but with perfect vision? (pamphlet)
4. Blepharospasm Neurologic Considerations [1 pg]
5. What is Dystonia? [1 pg]
6. Diagnosis & Treatment July & Sept 90 [2 pgs]



I left this sample as I originally submitted it.

This is a very important part of what you submit to the Social Security Office. The reason is, more than likely they don't keep up with the latest on your disability, medications, etc. Although they have their own physician to review your medical paperwork, still submit all you can from organizations who specialize in your disability. This should include actual pamphlets (the whole pamphlet), and paperwork that you have on your disability.



There you have it. It's a lot of work, but you will be breathing a sigh of relief a lot sooner than if you go about this without careful organization.

Good Luck