

Social Security Tips Written By: Heather  
To be done BEFORE applying!!!

1. Collect all clinical and hospital chart records. Make a list of all the clinics and specialists you have seen. Doctor's full names, complete addresses, phone numbers, fax numbers. Same thing for hospital visits. Then call each clinic and hospital and put in a request for your records. They will have you fill out a records request form. On it, put chart notes/consult notes; labs; imaging; special tests; surgery report(s); etc. If you have the exact dates, that will help immensely. Check that you want paper copies. Note that the records are to go to you and put your complete address down. Also note on each request for records "This is for the Social Security Department to apply for SSDI, please rush! Thank you." I did one for each and every doctor I went to and made a photocopy of each request and wrote the date I faxed it to the clinic or hospital. I kept them in a special folder titled "Doctors" and when I got the records, I noted that on the Records Request as well. If I didn't get the records, I resent them, noting that it was a "2<sup>nd</sup> Request." In this folder, I also went online and got a printout of each and every doctor I could, and printed out their data such as their full name and title, where they worked, their resume, etc. Just in case I was ever asked about them.
2. The next thing I did was to organize all my records by clinic and date order with the most recent on top. I used dividers to list the clinic, hospital, and date of the visit and put them in binders. You have 2 options at this point. You can take them to a copy center and copy them yourself, or have Social Security do it. They will hold your records for 3 months and I didn't want them to get lost. So, I spoke with my claims manager and said I had an important appt with a Neurosurgeon who wanted to see my records and would need them sooner, so they made the copies themselves. Either way, you want to give them a binder and keep one for yourself. The next thing I did was to sit down and read thru all my chart notes from the earliest date to present. That way I knew what each doctor diagnosed me with even if they didn't tell me. I knew all the labs and tests they did, etc.
3. The next step I did was to sit down with all my charts and a notepad. I started with the earliest date and wrote, by clinic, each visit; the date; what my symptoms were and who I saw. That way it was easy for the claims manager to see at a glance each and every one of my symptoms even though the doctor may have left them out of the chart.
4. Collect also all of your imaging films. They may not ask for it. But, it is better to have it just in case.

5. In this “packet” the next item up for business was the letter from my Neurologist supporting my decision to apply for Social Security Disability. She talks about when I came under her care, the progressive symptoms that I’ve had all my life and the ones I had at the time she wrote the letter. She wrote about what tests were done and that based on those tests, what diagnoses they ended up with and what treatment they started me on. She discusses the fact that even though I am on medication, my symptoms continue to worsen and my level of functioning rapidly deteriorates.

She gets this all from the notes I give her at each and every visit documenting what symptoms I have on a daily basis. For example, she describes placing me on Provigil for severe debilitating fatigue. She discusses that the symptoms I am experiencing from MS “preclude any gainful activity.” She says that as a result of my fatigue, I lack the strength, energy, or stamina to simply shower on a daily basis or get dressed. She reports that brushing my hair and teeth and washing with a washcloth is the most I can do at least 3 to 4 days a week. She discusses the fact that I don’t have the energy or strength to cook and that I am unable to lift pots, pans, plates, etc. She talks about all my other symptoms, like the cognitive issues, mood issues, speech issues, difficulty with conversations, difficulty with memory and recall, difficulty with moods, recalling thoughts, conversations, etc. She discusses the physical symptoms: severe muscle spasms, numbness and tingling, loss of sensation, joint pain, muscle weakness, bowel and bladder problems, visual problems, headaches, dizziness, fainting, needing a wheelchair.

She is very detailed and uses my notes as examples which help paint a picture of my daily life. She then concludes with the fact that MS is not considered life-threatening and that medication is supposed to theoretically slow the progression of the disease but even in best case scenarios, she anticipates continued deterioration over time. She states that disability is expected to increase and progress over time. She finishes by clarifying her experience and that in her professional opinion; I am totally medically disabled and incapable of maintaining any gainful activity on a reliable basis. She then wholeheartedly supports my application for SSDI and offers Social Security the opportunity to contact her if they need to. NOTE: Be sure to use a doctor who knows your case and symptom progression well. Someone you trust.

6. My next piece of support came in the form of an “Affidavit” on my behalf from my husband. He introduces himself and states how long he’s known me. He states that in the beginning, what occupation I used to do and what activities we enjoyed. He discusses the fact that I worked and went to college all while raising a 3-year-old daughter. That I was a very active person. Then from his view point, he documents my health decline including all the doctor appointments, tests, medications, and continued symptoms. He details how our lives have changed as a result of my progressing symptoms. For example, hygiene, cooking, housework, paying bills, shopping and errands. He

discusses how hard it is to see this decline in my health, but cannot see how I will ever be able to work at any job. He concludes by offering to discuss this matter with any persons needed. And, most importantly, he has this NOTARIZED!! You can have as many Affidavits as you want from family, friends, coworkers, etc.

7. I then provided a typed list by clinic and department with complete addresses, phone number, record's department number, medical record number, doctor's name and title, and diagnoses given or what I saw them for. This included each hospital visit.
8. The next piece of documentation included an "Impact on Daily Life." The heading listed all my diagnoses and that they have made a progressive impact on my daily life. I wrote that the following symptoms occurred on a daily basis in random, unpredictable order and ranged from moderate to severe:
  - a. Severe Overwhelming Fatigue
  - b. Cognitive Dysfunction (Thinking/Problem Solving/Reasoning/Decision Making)
  - c. Mood Swings
  - d. Speech
  - e. Muscle Spasms/Pain
  - f. Paresthesia (numbness/tingling)/Pain
  - g. Muscle Weakness
  - h. Balance/Coordination
  - i. Bladder/Bowel Spasms
  - j. Vision
  - k. Temperature Intolerance
  - l. Lightheadedness/Syncope
  - m. Chronic Headaches/Migraines
  - n. Tachycardia/Palpitations
  - o. Backache/Joint Pain

In the above, for each item, I described how it felt to me and how it affected me as well as what I have tried and whether it worked or not. I am very blunt and not ashamed do describe in detail each of these symptoms. That's important.

9. The next section comes from my class on applying for Social Security and unfortunately deals with MS. But, they are forms that detail various symptoms that seriously impair your ability to work. They are: Fatigue, Pain and several blank forms. So, I used them for: Debilitating Weakness; Severe Headaches; Muscle Spasms; and Tachycardia/Palpitations.
10. My next typed document deals with an unusual diagnosis I was given in which I thought that the case worker may not know about or understand. I was sure it wouldn't be looked up. The diagnosis was called "Dysautonomia"

and was the apparent cause of my Tachycardia/Palpitations. I explained that my electrocardiologist had identified a birth defect in my heart and tried to correct it, but it failed, leaving me with a higher resting heart rate. I then listed all the symptoms related to the condition as well as a life-threatening syndrome that can occur in patients like me. I went on to describe the current status of the condition and that I was hospitalized for syncope due to worsening symptoms of the condition.

11. Because I had been diagnosed with MS, I had obtained a MS Journal that I could fill out that documented everything about my MS symptoms and treatment. It was designed to be given to the doctor, but I used it in my application for SSDI as well. It provided useful information.
12. The next item was a Sleep Questionnaire, obtained online from Social Security. It is very helpful in continuing to paint that picture of what your life is REALLY like.
13. The next item was a Pain Questionnaire, obtained online from Social Security. Another helpful tool in giving them a picture of what your daily life is like.
14. The next piece of information took some time for me to type, but was very helpful. I titled it "Timeline" and began with the earliest year I remember symptoms. I put the year, then my age, then what symptoms I was having, whether I saw a doctor and what tests were done, and what difficulties I encountered as a result of that symptom. I went year by year up until the present date and what evolved was the list of symptoms, doctors, tests, diagnoses, medications, etc...all got longer and longer. Then I concluded it with a list of my remaining symptoms that come and go. There were 19.
15. The next piece of information I supplied them with was actually on their online form, but I didn't have the room, so I created a spreadsheet for it. It was a list of my medications. I listed each drug name, the prescribing doctor, the reason for it, and ALL the side effects (you can find them online by looking up the medication).
16. I included a week's worth of MS Daily Activity Diary which you wrote the time of day, your activity, and a comment. You then had to rate everything with a number from 1 to 10 based on the following:
  - a. F=level of fatigue
  - b. V=value or importance of activity you are doing
  - c. S=satisfaction you feel you performed the activity
17. I had a worksheet on the level of pain I had which asked important questions such as: location; if it moves; when did it start; is it always present; is it brief or long-lasting; rate it on the pain scale; what makes it worse; does anything relieve the pain; how does it affect the rest of your body; does it interfere with your social life; has it changed your life; describe the pain (sharp, cramping, aching, numb, etc.); factors that exacerbate the pain (movement, sitting,

eating, weather changes, walking, etc.); if it affects sleep; if it affects appetite, etc.

18. One thing I learned could be helpful was Employee Reviews from past employers. If you had many and they reported similar difficulties, it indicates that there may be an underlying problem not identified but present over the course of you trying to work. Not always easy to get, but worth a try.
19. If your condition has caused you to need any special medical equipment such as shower chair, cane, forearm crutches, wheelchair, scooter, or disabled parking permit, be sure to list that as well.
20. Finally, I did have a list on top of all this data that detailed what I was giving them. I titled it, "Article List Submitted by Heather Lynn Harja with my social security number." It read something like this:

- a. Letter from Dr. Mariko Kita
- b. Affidavit from Spouse
- c. Doctor List
- d. Hospital List
- e. Clinic List
- f. Test List
- g. My Conditions
- h. My Symptoms
- i. My MS Journal
- j. Sleep Questionnaire
- k. MS Daily Activity Diary
- l. Pain Worksheet
- m. Timeline of Symptoms
- n. Medication List
- o. Employment History (they don't give you enough space on the app)
- p. Performance Review
- q. Birth Certificate (self)
- r. Birth Certificate (daughter)
- s. W-2 Forms
- t. CT and MRI Films (if needed)...they didn't take them or ask for them.

Okay, on the website for Social Security, they have the application so you can fill it out online. The website is: <http://www.ssa.gov/> You DO NOT want to fill it out at this point. You want to bring up the application and then print it out. That way you can fill in the blanks. NOTE: Social Security works on a timeline. As soon as you start to fill out the application online or you make your first appointment to apply for benefits, the clock starts ticking. If you don't have all the "ammo" you need for this battle, time will be against you.

Now, in your printed out “Internet SSDI Questionnaire” you will be asked a ton of questions. Many you many already know. Many, you will have to dig into your medical records for the information. Some of it, they won’t give you enough room for. In that case, you will have to type it out. When that happens, in the top center of the page, type your full name, social security number, and SSDI Internet Questions. Then below that on the left side, type in what part the question is in (for example...Part One) and what question it is asking (for example...4A. Describe your Conditions). List ALL your conditions. Even if ACM/CCI/Cranial Settling/TC are not accepted conditions, you may have been diagnosed with one that is accepted. Look on the Social Security website for that list. I know that Fibromyalgia and Chronic Fatigue Syndrome are listed. As you go through the application, if you need extra space, just continue to type it below the previous question in the same fashion. Be as honest and thorough as possible. For example, in the section mentioned above about “Describing my Conditions”, I realized that the case manager that may get my case may know nothing about the conditions I have or the symptoms they present or how debilitating they may be. So, I would type the diagnosis and then after looking it up online, give a brief concise description of what exactly it is.

Here’s an example: Dysautonomia: An imbalance or peculiar volatility in the autonomic nervous system. The autonomic nervous system loses the required balance between the sympathetic and parasympathetic nervous systems causing one to inappropriately dominate. Symptoms include frequent vague disturbing aches and pains, faintness, fainting spells, fatigue, severe anxiety attacks, tachycardia, hypotension, poor exercise tolerance, irritable bowel syndrome, sweating, dizziness, blurred vision, numbness and tingling, anxiety, and depression. The symptoms can be fleeting and unpredictable or triggered by specific situations or actions. At this time there is no cure.

Note: you may gather all this wonderful information and gleefully make your appointment to apply for Social Security. I recommend applying in person, not online. You may get there and try to give the clerk at the computer all your hard earned paperwork supporting your case only to be told they don’t need it. **DON’T FALL FOR THAT ONE!!** They may say that they will get all your doctor’s records. But, that depends on how cooperative your doctor’s office is and what they actually supply to Social Security. If they don’t send what your case worker needs, it will delay analyzing your case. So, if you give them all your records, they have it all. Time saved. You can still sign the forms for them getting records, but they shouldn’t need to get any if you collected them all beforehand. Furthermore, you have the **RIGHT** to have as much supporting documentation as you want to **PROVE** that there is no way you can work 8 hours a day, 7 days a week doing any kind of job. It doesn’t matter to Social Security if you can’t go back to Plumbing, they may think you could do McDonald’s instead. So, it is up to you to prove in your letters and affidavits that you absolutely can’t do any kind of work at all. And yes, you can have more than one affidavit. Just be sure to get each one notarized. Most of all, keep copies of everything you give them and ask them for a receipt.

Be prepared to give them your bank account number, rent or mortgage information, medical bills remaining, etc. They will go over what services you may be eligible for based on your current gross income.

Next, after the whole application process, wait a couple days, and then call to find out who your case worker is and what their phone number is. Call them up, introduce yourself, and ask if there is anything else they may need in order to process your case. Then wait another 2 weeks and call and ask if they need anything at that time.

Most cases that are denied the first time is because all the above information was either not provided or your description just didn't paint a picture of a miserable disabled life. The only way to prevent that is to do your homework first BEFORE you apply. It may seem like a lot, but if you are denied, the appeal process can be quite long, complicated, and requires time limits. Your only hope is to get a Social Security Lawyer and have them go thru the info you provided to see where it is lacking. I know of a guy who waited 5 years to finally get approved. It doesn't have to happen that way.

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