



Georgia Benefits Support

FREE PRINTABLE PLANNING TOOL

SSI & SSDI Application Checklist

Gather the facts Social Security may ask for, organize your evidence, and keep a clear record of every next step.

Start the claim even if your folder is not complete. Social Security says not to delay applying because you do not have every document. Submit what you have, identify what is missing, and respond promptly when SSA asks for more.

Which program?

Social Security Disability Insurance (SSDI) is based on insured work history.

Supplemental Security Income (SSI) is needs-based and also reviews income, resources, and living arrangements.

Some people may qualify for both. Ask SSA to screen for every program that may apply.

Your application route

- ☐ Online
- ☐ Phone: 1-800-772-1213
- ☐ TTY: 1-800-325-0778
- ☐ Local Social Security office

Application started: _____ / _____ / _____

Georgia Benefits Support · Independent Benefits Navigation for Georgia Families

1 Identity, family & core documents

SSI & SSDI Application Checklist

Personal information

- ☐ Legal name, name at birth, date and place of birth
- ☐ Social Security number and any other number used
- ☐ Citizenship or lawful-status information, if applicable
- ☐ Current mailing address, phone, and email
- ☐ Current and former spouse information
- ☐ Marriage dates and places; ending dates and reasons
- ☐ Eligible child information SSA asks about
- ☐ Prior Social Security, SSI, or Medicare claims
- ☐ Bank routing and account information for direct deposit

Documents SSA may request

- ☐ Birth certificate or other proof of birth
- ☐ Proof of citizenship or lawful status if born outside the U.S.
- ☐ Military discharge papers for service before 1968, if applicable
- ☐ Last year's W-2s or self-employment tax return
- ☐ Medical records, reports, and recent test results already on hand
- ☐ Proof of workers' compensation or similar benefits

Originals: SSA may need to see originals for many identity documents. It accepts photocopies of W-2s, self-employment tax returns, and medical documents.

Missing item:

Who I will contact:

Official sources: SSA Form SSA-16 information | Apply online for disability benefits

2 Build a complete medical picture

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List every provider and facility that treated the conditions affecting your ability to work. Give complete contact information and treatment dates so SSA can request the right records.

Conditions and important dates

Physical conditions:

Mental-health conditions:

Date conditions began affecting work:

Date you stopped working or reduced work:

Provider and facility tracker

Provider / facility	Address & phone	Treatment dates	Condition / treatment

Medication list

Medication & dose	Prescriber	Side effects

Tests, procedures & devices

- ☐ Imaging: X-ray, MRI, CT, ultrasound
- ☐ Laboratory or pathology tests
- ☐ Cardiac, pulmonary, neurologic, or psychological testing
- ☐ Surgeries, emergency visits, and hospital stays
- ☐ Assistive devices and who prescribed them
- ☐ Therapy, counseling, rehabilitation, or home health

Dates / locations:

Next

Use the function worksheet on page 3 to turn symptoms into specific examples of day-to-day and work-related limits.

Official sources: SSA: disability information requested for SSI | SSA policy: medical evidence responsibilities

3 Turn symptoms into functional examples

SSI & SSDI Application Checklist

A diagnosis names the condition. Your examples show what the condition prevents, interrupts, slows down, or makes unsafe. Describe a typical day and a bad day accurately.

Physical activity

- ☐ Sit, stand, or walk: how long at one time?
- ☐ Lift or carry: how much and how often?
- ☐ Reach, handle, bend, climb, or use stairs?
- ☐ Need a cane, walker, brace, oxygen, or other device?

Example:

:

Thinking and pace

- ☐ Focus, remember, or follow instructions?
- ☐ Start and finish tasks?
- ☐ Maintain pace without extra breaks?
- ☐ Handle changes, decisions, or unexpected demands?

Example:

:

Attendance and symptoms

- ☐ How often are there flare-ups or bad days?
- ☐ How long do symptoms or recovery last?
- ☐ How many appointments interrupt a normal month?
- ☐ What triggers symptoms or makes them worse?

Example:

:

Interaction and self-management

- ☐ Interact with supervisors, coworkers, or the public?
- ☐ Manage stress, emotions, or panic?
- ☐ Complete personal care, meals, chores, or errands?
- ☐ Need reminders, supervision, or hands-on help?

Example:

:

Make each example concrete

1 — Task: Name the activity — for example, standing to cook or following written instructions.

2 — Limit: Say what happens and after how long.

3 — Frequency: State how often this occurs, including bad days or flare-ups.

4 — Support: Note any device, reminder, supervision, extra break, or recovery time.

Example structure: "After standing for about ___ minutes, I experience _____. This happens ___ days per week. I need to ___ for about ___ minutes before I can continue."

Helpful third-party contact

Choose a trusted adult who knows how your conditions affect you and can help SSA reach you.

Name and relationship:

Phone and email:

Official references: SSA adult disability and function-report forms | SSA consultative-examination guidelines

4 Describe your work – not just the job title

SSA generally examines qualifying work from the past five years. Two people with the same title can perform very different duties, so describe what you actually did.

Work-history details to gather for each job

- ☐ Employer name and location
- ☐ Job title and exact dates worked
- ☐ Hours per day and days per week
- ☐ Rate of pay and how often paid
- ☐ Main duties, tasks, tools, and equipment
- ☐ Skills, training, and level of supervision
- ☐ Time spent sitting, standing, and walking
- ☐ Heaviest and most frequent weight lifted
- ☐ Reaching, handling, bending, climbing, or kneeling
- ☐ Speaking, hearing, vision, or environmental demands
- ☐ Extra help, reduced hours, absences, or extra breaks
- ☐ Why the job ended or duties changed

Employer / job	Dates & schedule	Main duties & physical/mental demands	Why it ended / accommodations

Keep earnings documents handy

Last year's W-2s or self-employment tax return; current and prior-year employer or self-employment details; pay received after you stopped working; and proof of workers' compensation or similar disability-related payments.

SSI applicants: add financial & living details

SSI is needs-based. SSA reviews non-medical eligibility before or alongside the disability review.

Income and resources

- ☐ Recent pay stubs or self-employment records
- ☐ Benefit letters, pensions, annuities, or other income
- ☐ Bank and credit-union accounts
- ☐ Cash, investments, and other financial resources
- ☐ Vehicles, real property, trusts, or other assets
- ☐ Life-insurance information, if requested

Living arrangement

- ☐ Names of everyone in the household
- ☐ Rent, mortgage, utilities, and who pays them
- ☐ Food and shelter help received from others
- ☐ Lease, rent receipt, or household-expense proof
- ☐ Marriage information and spouse's income/resources

SSI item I still need:

Where I will get it:

Official sources: SSA: past-work information | SSA policy: SSI application information

5 Submit carefully, then stay reachable

Before you submit

- Names and dates match across forms
- Every condition affecting work is listed
- Every relevant provider and facility is listed
- Work duties are specific, not title-only
- Answers explain frequency, duration, and help needed
- Blank questions are marked “none” or “not applicable” when appropriate
- Copies are saved for your records

After you submit

- Save the confirmation page or receipt
- Open every SSA or disability-office notice promptly
- Answer calls and return forms by the stated deadline
- Report new providers, tests, diagnoses, or hospital visits
- Attend any requested consultative examination
- Keep treatment and contact information current

Application and follow-up log

Date	Agency / person	What was submitted or discussed	Confirmation / next step

If SSA schedules an examination

Attend it or contact the number on the appointment notice immediately if you cannot. Bring your current medication list and be ready to explain your symptoms and day-to-day limits accurately.

Privacy reminder

Keep full Social Security numbers, bank numbers, and medical records off ordinary email. Use the submission method SSA provides, bring documents to an office, or follow the instructions on your SSA notice.

Official tools

Disability overview and application
ssa.gov/disability

SSA forms
ssa.gov/forms

Upload Documents

Use the secure link sent by an SSA representative when that option is offered.

[SSA Upload Documents FAQ](#)

Need help organizing your next step?

Georgia Benefits Support offers free educational resources and paid one-on-one navigation sessions for Georgia families. georgiabenefitssupport.com | info@georgiabenefitssupport.com

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