Documents and Information Checklist for Your Application

Why This Matters

Applying for Social Security Disability Insurance (SSDI) asks for a lot of information — about you, your work history, and your medical condition. Gathering it ahead of time can make the application go much more smoothly, and can reduce the stress of hunting for documents while you're in the middle of filling out forms.

Use this checklist before you begin your application. You don't need everything memorized — just gathered in one place.

What You Need to Know

Information about your condition

☐ Names and phone numbers for your doctors
☐ Names and phone numbers for hospitals or clinics where you've been treated
☐ Medical tests you've received
☐ Medication(s) you take
☐ Date of injury and claim number for workers' compensation, if applicable
☐ Signed permission to access your medical records (SSA-827)

Basic information about yourself

☐ Social Security number
☐ Where you were born (city, state, country)

Your earnings history

☐ A record of your reported earnings

Authorize Healthcare Professionals to Release Healthcare Information

☐ Obtain and sign SSA-827 form

Work within the last five years

☐ Employer names
☐ Dates worked
☐ Average hours worked
☐ Pay rates

Current and past marriages

☐ Your spouse's or former spouse's Social Security number and birthday
☐ Date you got married or divorced
☐ Where you got married (city, state, country)

Direct deposit for benefit payments

☐ Routing and account number for your bank account

☐ Names of your children

Take Action

- Create one folder — physical or digital — for everything on this list.
- Ask your health care provider's office for a current list of your diagnoses and medications.
- Sign and date SSA-827 (Authorization to Disclose Medical Information) as early as possible so records can be requested without delay.
- Review the SSA Adult Disability Starter Kit before you begin.

Questions to Ask

- Do I have everything I need, or is there a gap I should fill before I start?
- Is there a family member or friend who can help me track down anything I'm missing?
- Should I apply online, by phone, or in person?

Helpful Tips

- Keep a copy of everything you submit, including confirmation numbers.
- If you're missing something, don't wait to start — the online application can be saved and finished later.
- Ask a trusted family member or care partner to double-check the list with you.

Helpful Resources

- Social Security Administration: https://www.ssa.gov/
- SSA Adult Disability Starter Kit (available here)
- National Council of Dementia Minds Resource Hub

Things to Consider

- Every situation is different.
- You may want to discuss this with your family, care partner, or a trusted advisor.
- There may be financial, legal, or employment implications involved in your decisions.
- Seek additional advice from a qualified professional before making important decisions.

Quick Reference

Remember: You don't need to have every document perfectly organized before you start. Gathering what you can, and noting what's missing, is enough to begin.

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