



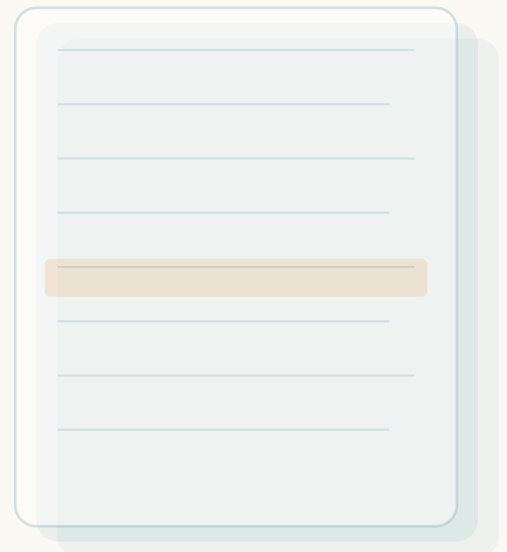
ARDENT WORKSHOP

AN ARDENT WORKSHOP PRODUCT

Disability Claim Document Checklist

What a disability or SSDI claim runs on — and where each piece lives.

Free · print and use



What a disability claim runs on

Everything a disability or SSDI claim runs on, in one list. Work down it, note where each piece lives, and set a status. This is the gathering step — the full organizer adds the appeal-deadline clock, the medical-evidence index, and the claim timeline.

COUNT 65 DAYS, NOT 60

The one number worth carrying before you gather anything: SSA gives you 60 days to appeal, but they run from the day you received the notice — and SSA presumes that was 5 days after the date printed on it. So it is 65 days from the notice date. Work from the deadline printed on your notice, and if one has passed, contact SSA or a representative today: SSA can accept a late appeal for good cause. (SSA's POMS policy manual, [GN 03101.010](#) on the time limit and [GN 03101.020](#) on good cause.)

Area	What to gather — and why it matters	Where it lives	Status
The notices	Every letter SSA has sent you The date printed on a decision notice is what your appeal countdown is worked out from (65 days, not 60 — see the note above). Keep the envelope too if its postmark is later than the notice.		
	Your receipts and confirmation numbers for anything you filed Proof of what you filed and when, if a filing is ever questioned.		
Medical evidence	Imaging, laboratory results, and other objective testing Objective medical evidence is what can be observed apart from your own statements. Request it from the imaging center or lab directly — a portal often holds only a summary.		
	Treatment notes from every provider Clinical findings, what was tried, and how you responded — including treatments that did not work.		
	A medical opinion on what you can still do Ask for the specific one: what you can sit, stand, walk, lift, and carry, and for how long. An opinion is weighed on how well it is supported and how consistent it is with the record.		

Area	What to gather — and why it matters	Where it lives	Status
	Records for every secondary condition, not just the main one Secondary conditions are the ones that get left off. If a mental-health condition came with the physical one, it needs its own evidence.		
	Anything you cannot get — noted as unavailable An unexplained gap invites the worst reading. A stated one is a fact that can be worked with, and it stops you chasing a record that no longer exists.		
Providers	Every place you have been treated, with dates SSA asks for this on the Adult Disability Report (SSA-3368) and uses it to request your records. Gaps here become gaps in the file.		
	The records-department number for each one It is usually a different number from the front desk, and it is the one that actually sends records.		
	Any release forms a provider needs signed Counseling notes especially. Ask what form they need when you ask for the record, not a month later.		
Medicines	What you take, the dose, and who prescribed it SSA asks for your medicines on the Disability Report.		
	The side effects you notice Drowsiness that costs you an afternoon is part of why you cannot work — and it is the detail people most often forget to mention.		
Work history	Your jobs, with dates and employers SSA collects this on the Work History Report (SSA-3369), which the state agency sends when it needs more detail about your jobs than the Adult Disability Report (SSA-3368) captured. SSA looks at the work you did in the past five years.		
	What each job physically and mentally required Step 4 asks whether you can still do your past work, based on what it actually required. Step 5 uses those same job details to weigh whether skills you gained would transfer to other work. Job titles are useless either way; demands are everything.		

Area	What to gather — and why it matters	Where it lives	Status
	Why you stopped working The sentence that connects the condition to the work.		
Your own account	A dated symptom and function log Statements from nonmedical sources (anyone who is not a clinician — including you) count as evidence. Write what a symptom stopped you doing, and log good days too.		
	A statement from someone who saw the change A former supervisor or a family member is a nonmedical source too. Ask in writing, and give them something specific to describe.		
Admin	A dated log of every call and letter So you are never arguing from memory. Always get a name and a reference number.		
	One page you can print and take with you The page that answers "where are you up to?" at an appointment or a hearing, on a day you cannot hold it in your head.		
	Somewhere safe to keep it — and one person who knows where Records only help if they can be found on a day you cannot look for them. Keep what you have and where it lives, never passwords or your Social Security number.		

Print this and work down it. The spreadsheet version in the same download opens pre-filled with a worked example (a fictional claimant) so you can see how each line is used, and has a Status dropdown that colors itself.

What this leaves out

This checklist is the gathering step, and it stops there — deliberately. It will tell you what to collect. It will not count your deadlines, tie each record to the impairment it supports, or tell you what still needs doing today.

What the full organizer adds	Why it matters
The appeal clock	Type the date on a decision notice and it works out the presumed-receipt date, your reminder, and the days left — then flags it green, amber, or red before the window closes, and fills in which form that level takes.
The medical-evidence index	Every record tied to the impairment it actually speaks to, and whether it has ARRIVED or was only asked for.
The claim timeline	Every step in the order it happened — what you filed, when, and what SSA decided.
A live dashboard	What needs action today, what you are still waiting on, and how far through you are — pulled live from every other tab.

[Get the full Disability / SSDI Claim & Records Organizer >](#)

Keep the organizer working for you

A disability claim is decided on the evidence in your file. You cannot control the diagnosis, and you cannot control the decision. What you can control is whether the evidence was gathered, whether the dates were written down, and whether anything slipped while you were too unwell to chase it. That is the part this organizer is for: log each notice and each medical record as it arrives, and the timeline, the evidence index, and the appeal clock are there when you need them.

You own this file outright. No seats, no monthly fee, no app holding your medical records — just a structured file you keep and control.

START FREE, THEN GROW INTO THE FULL ORGANIZER

Just starting to gather paperwork? The free Disability Claim Document Checklist is the one-page list of what to collect and where each piece lives. [Get the free checklist >](#) And find more owned-records tools for claimants and families on the hub. [Tools for disability claimants >](#)

This organizer is one of many owned-records tools from Ardent Workshop — operations, finance, and life-admin files for people who want their data in a file they own, not a subscription. See them all at ardentworkshop.com.

A note on what this is. This is an organizer that helps you sort and track your own records, evidence, and dates — not legal, medical, or benefits advice. Ardent Workshop is not affiliated with, endorsed by, or connected to the Social Security Administration or any government agency. It does not file anything for you, does not decide whether you are disabled or eligible for any benefit, does not compute your official deadlines, and guarantees no result. The example claimant, providers, employers, and dates are fictional. It stores no logs, passwords, or Social Security numbers — keep those out of the file. Your eligibility, the evidence that matters, and the date any deadline actually falls are set by SSA, by the notices SSA sends you, and by the rules that apply to your case. The dates in this file are your own reminders, not official ones — always work from the deadline printed on your notice, and if a deadline is close or has passed, contact SSA or a representative right away.

© Ardent Workshop LLC. Licensed for use by the original purchaser and their household. Please don't resell, share, or redistribute the templates or this bundle. Not affiliated with or endorsed by the Social Security Administration or any government agency.