

Index

ABSTRACT

Medical records, **5:8**

ADA

Applicability to disability determinations, **1:23**

AFFIDAVIT

Motion to proceed in forma pauperis in federal district court appeals, **10:8**

ALCOHOLISM

Impairment, **2:23**

ALIENS

Eligibility restrictions, **2:19**

AMERICANS WITH DISABILITIES ACT

Applicability to disability determinations, **1:23**

ANXIETY

Generally, **2:48**

APPEAL AND REVIEW

Appeals council
pre-effectuation review of decisions by appeals counsel, **3:21**
process improvement action plan, **3:28**
review by, generally, **3:22**
Application of circuit court law (acquiescence), **3:27**
Attorneys' fees, **1:16**
Disability report (SSA-3441-BK), **9:62**
Expedited appeals process, **3:20**
Federal district court appeals generally, **10:1 to 10:10**
for detailed treatment, see index heading FEDERAL DISTRICT COURT APPEALS
Hearing decision, request for review of (HA-520-U5), **9:77**

APPEAL AND REVIEW—Cont'd

Issue preclusion, **3:31**
Judicial review
generally, **3:29, 10:1 to 10:10**
for detailed treatment, see index heading FEDERAL DISTRICT COURT APPEALS
Practice guide, walkthrough of online application
third party, **3:32**
Pre-effectuation review of decisions by appeals counsel, **3:21**
Reconsideration. See index heading RECONSIDERATION
Remand, **3:25, 3:26**
Scope of judicial review, **3:30**

APPLICATIONS

Benefits, generally, **3:3**
Child's insurance benefits (SSA-4-BK), **9:7**
Disability insurance benefits - Adult (SSA-16-F6), **9:2**
Evaluation of, **2:12**
Social Security card (SS-5), **9:1**
Subsequent applications for benefits, **3:4**
Supplemental security income (SSA-8001-BK), **9:6**
Withdrawal, request for (SSA-521), **9:8**
World War II veterans, application for special benefits for (SSA-2000-F6), **9:48**

APPOINTED REPRESENTATIVE SERVICE (ARS)

Overview of social security process, **1:6**

APPOINTMENT OF REPRESENTATIVE

Generally, **1:5**
Form for (SSA-1696-U4), **9:55**

APPOINTMENT OF

REPRESENTATIVE—Cont'd

- Letter notifying of, **9:53**
- Revocation of, by claimant (SSA-1696-SUP1), **9:56**
- Right to counsel, generally, **3:10**
- Withdrawal of acceptance by representative (SSA-1696-SUP2), **9:57**

APPOINTMENT OF VOCATIONAL EXPERT

- Letter requesting, **7:44**

ARTIFICIAL INTELLIGENCE(AI)

- Social security practice, use of, **4:17**

ATTORNEYS' FEES

- Agreement, fee agreements, **1:12 to 1:14, 1:19**
- Appeal of partially favorable decisions, **1:16**
- Authorization process, **1:8**
- Collecting fees, **1:9 to 1:18**
- Continuing disability reviews, **1:17**
- Contract forms, **7:29 to 7:33**
- Direct payment of authorized fees, **9:86**
- Equal Access to Justice Act, **1:7**
- Gisbrecht v. Barnhart, **1:10**
- HALLEX provisions on fee agreements, **1:14**
- Initial cases, **1:15**
- Multiple representatives, **1:19**
- Petition for
 - generally, **1:11, 9:83 to 9:90**
 - authorization to charge and collect a fee (SSA-1560), **9:84**
 - business entity tax payer information (SSA-1694), request for, **9:85**
 - direct payment of authorized fees, **9:86**
 - letter to administrative law judge enclosing petition, **9:83**
 - representative registration, **9:87**
- Reasonable rates
 - generally, **1:10**
- Reconsideration cases, **1:15**
- Representative registration, **9:87**

ATTORNEYS' FEES—Cont'd

- SMS or telephone authorization, **7:33**
- Social Security contingent fee agreement, two-tiered, **7:32**
- Social Security representation, **4:4**
- SSI and concurrent (Title II and Title XVI) cases, **1:18**
- Timing and considerations
 - motions for fees under 406(b), **1:20**
- Travel expenses, **1:26**
- User fee, **1:13**

AUTHORIZATION FOR RELEASE OF INFORMATION

- Generally (SSA-827), **9:9**
- Consent for release of information (SSA-3288), **9:10**
- Medical authorization forms, **8:1**
- Model attestation
 - reproductive health, protected health information, **8:2**
- Sms or telephone authorization, **7:33**

AUTISM

- Generally, **2:47**

AUTISM SPECTRUM DISORDER

- Mental/ psychological/ psychiatric impairments, **2:49**

BENCH DECISIONS

- Generally, **3:16, 9:75**

BIAS

- Administrative law judges, **3:13**

BLINDNESS

- Generally, **2:57, 2:58**

BRAIN INJURIES

- Generally, **2:46**

CALENDAR

- Time keeping system, **7:34**

CANCER

- Generally, **2:35**

CARDIOVASCULAR IMPAIRMENT

- Generally, **2:28**

INDEX

CARE AND RESPONSIBILITY FOR BENEFICIARY

Statement of (SSA-788), **9:35**

CESSATION OF DISABILITY

Request for reconsideration (SSA-789-U4), **9:80**

CHECKLISTS

ALJ bench decision checklist, **9:75**

Case analysis, **7:28**

Client interview and conferences, **7:24**

Depositions, **7:9**

Evidence, **9:71**

Federal district court appeals, **10:1, 10:2**

Hearings, **7:12**

Interrogatories, **7:10**

Medical records checklist for analyzing medical records, **8:10**

Telephone, **7:17**

Vocational experts, credentials checklist, **7:43**

CHILD-CARE DROPOUT

Questionnaire (SSA-4162), **9:27**

CHILDREN AND MINORS

Application for child's insurance benefits (SSA-4-BK), **9:7**

Certificate of responsibility for welfare and care of child not in applicant's custody (SSA-781), **9:28**

Child-care dropout questionnaire (SSA-4162), **9:27**

Childhood disability evaluation form (SSA-538-F6), **9:25**

Child relationship statement (SSA-2519), **9:26**

Disability reports (SSA-3820-BK), **9:24**

SSI benefits, application of standards to children applying for, **2:16**

CHRONIC FATIGUE SYNDROME

Generally, **2:55**

CIVIL COVER SHEET

Federal district court appeals, **10:3**

CLAIMANT'S STATEMENT

See index heading STATEMENT OF CLAIMANT

CLIENT INTERVIEW AND CONFERENCES

See index heading LAW OFFICE MANAGEMENT

COMPLAINT

Federal district court appeals, **10:4**

COMPOSITE JOBS

Vocational considerations, **2:39**

CONFERENCES WITH CLIENT

See index heading LAW OFFICE MANAGEMENT

CONSULTATIVE EXAMINATIONS

Generally, **5:4**

CONTINUING DISABILITY

Attorneys' fees, **1:17**

Notice of review, **9:79**

Review

generally, **2:58**

attorneys' fees, **1:17**

notice of, **9:79**

Review report (SSA-454-BK), **9:78**

CONTRACTS AND AGREEMENTS

Attorneys' fees, **1:12 to 1:14**

CORONAVIRUS

Procedures implemented by SSA, **1:0.50**

CORRECTION OF RECORDS

Generally, **1:4**

COVID-19

Procedures implemented by SSA, **1:0.50**

CRITICAL CASES

Expedited processing of critical cases, **3:23**

CROSS-EXAMINATION

Vocational experts, **9:73**

DAILY LIFE QUESTIONNAIRE

Generally, **7:23**

DECEASED BENEFICIARY

Claims for amount due (SSA-1724),
9:47

**DEDICATED SAVINGS
ACCOUNTS**

Generally, **2:18**

DEFINITIONS

Disability, **2:10**

DENIAL

Letter informing client of, **9:76**

DEPOSITIONS

Checklist, **7:9**

DEPRESSION

Generally, **2:47**

**DETERMINATION OF
DISABILITY**

Generally, **2:1 to 2:60**
Digestive disorders, **2:29**
Skin disorders, **2:30**

DIABETES

Generally, **2:37**

DIAGNOSIS

Form, **8:8**

DIGESTIVE DISORDERS

Generally, **2:29**

DIRECT DEPOSIT

Generally, **1:3**

**DISABILITY CLAIMS PROCESS
IN REGION I**

Termination of DSI program in
Region 1, **1:22**

**DISCLOSURE OF RECORDS AND
INFORMATION**

Generally, **1:4**

DISCOVERY

Generally, **3:9**
Interrogatories. See index heading
INTERROGATORIES

DISCRIMINATION

Administrative law judges, **3:13**

DISCRIMINATION—Cont'd

Applications, discrimination com-
plaint, form of (SSA-437-BK),
9:46

DISMISSAL

Review of, **9:59, 9:60**

DOCKET CONTROL

See index heading LAW OFFICE MANAGE-
MENT

DOWN SYNDROME

Generally, **2:56**

DRUG ADDICTION

Impairment, **2:23**

EARNINGS AND BENEFIT

ESTIMATE STATEMENT

Correction request (SSA-7008), **9:11**
Information, request for (SSA-7050-
F4), **9:12**
Primary insurance amount determina-
tion (SSA-794), **9:38**

EARNINGS INFORMATION

Request for (SSA-7050-F4), **9:12**

EATING DISORDERS

Generally, **2:51**

ELECTRONIC SERVICES

Overview of social security process,
1:5

ELIGIBILITY

Generally, **2:4 to 2:9**
Children's Supplemental Security
Income, **2:7**
Disabled adult child benefits, **2:9**
Disabled widow's benefits, **2:8**
Social Security Disability Insurance,
2:5
Supplemental Security Income, **2:6**

EMPLOYER

Letter requesting information about
client, **7:26**
Special wage payment report (SSA-
131), **9:15**

ENDOCRINE DISORDERS

Generally, **2:37**

INDEX

EQUAL ACCESS TO JUSTICE ACT

Generally, **1:7**

EVALUATION OF APPLICATIONS

Generally, **2:12**

EVIDENCE

Checklist, **9:71**

Submission of evidence, **3:12**

Summary (SSA-887), **9:81**

Waiver of claimant to examine additional evidence, **9:72**

Witnesses. See index heading **WITNESSES**

EXERTIONAL AND NONEXERTIONAL LIMITATIONS

Generally, **2:43**

Specific limitations that erode the sedentary occupational base, **2:44**

EXPENSES

See index heading **LAW OFFICE MANAGEMENT**

EXPERTS

Obtaining, generally, **4:14**

Vocational experts. See index heading **VOCATIONAL EXPERTS**

FALSE OR MISLEADING STATEMENTS

Penalties for, **2:2**

FARMING

Farm arrangement questionnaire (SSA-7157-F4), **9:16**

Person living outside United States, supplemental statement of farming activities of (SSA-7163A), **9:18**

Self-employment questionnaire (SSA-7156), **9:17**

FATIGUE

Chronic fatigue syndrome, **2:55**

FEDERAL DISTRICT COURT APPEALS

Generally, **10:1 to 10:10**

FEDERAL DISTRICT COURT APPEALS—Cont'd

Acknowledgment of receipt of complaint, **10:6**

Affidavit in support of motion to proceed in forma pauperis, **10:8**

Checklist

appeals, **10:2**

procedure, **10:1**

Civil cover sheet, **10:3**

Complaint, **10:4**

Motions

in forma pauperis, **10:7**

judgment on pleadings, **10:10**

Order to proceed in forma pauperis, **10:9**

Remand vs. reversal, **3:25**

Summons, **10:5**

Types of remands, **3:26**

FEES

Attorneys' fees

generally, **1:9 to 1:18**

for detailed treatment, see index heading **ATTORNEYS' FEES**

Representative registration, **9:87**

Timing and considerations
motions for fees under 406(b), **1:20**

Vocational experts, **6:6**

FELONS

Eligibility restrictions, **2:20**

FILES AND FILING SYSTEMS

See index heading **LAW OFFICE MANAGEMENT**

FOREIGN COUNTRIES

Employment questionnaire (SSA-7163), **9:19**

Farming activities of person living outside United States, supplemental statement of (SSA-7163A), **9:18**

FORMS

Disability claims, **9:1 to 9:90**

Federal district court appeals, **10:1 to 10:10**

Law office management, **7:1 to 7:50**

FORMS—Cont'd

Medical records. See index heading

MEDICAL RECORDS

FRAUD

Generally, **2:3**

GOVERNMENT PENSION

Questionnaire (SSA-3885), **9:21**

HEADACHES

Migraine, **2:31**

Primary headache disorders, **2:32**

HEARING IMPAIRMENT

Generally, **2:26**

HEARINGS

Administrative law judges, generally, **3:11**

Bias by an administrative law judge, **3:13**

Checklist, **7:12**

Discrimination by an administrative law judge, **3:13**

Dismissal, review of, **9:59, 9:60**

Guide, disability hearing guide for administrative law judges, **7:13**

Interpreters, **3:18**

Letter informing client of, **9:64**

Misconduct by an administrative law judge, **3:13**

Notice of hearing, waiver of timely written (HA-510), **9:63**

Online video hearings, **3:14**

Pre-hearing analysis, **9:67**

Preparation, **4:15**

Presentation of case, **3:17**

Request for

administrative law judge hearing (HA-501-U5), **9:58**

administrative law judge hearing or review of dismissal, **9:59, 9:60**

Video teleconference hearings, **3:14**

Waiver of right to personal appearance before administrative law judge (HA-4608), **9:65**

HEMATOLOGICAL DISORDERS

Generally, **2:35**

HIV INFECTIONS (AIDS)

Generally, **2:33**

HOUSEHOLD EXPENSES AND CONTRIBUTIONS STATEMENT

Generally (SSA-8011-F3), **9:14**

HYPOCHONDRIASIS

Generally, **2:52**

HYSTERIA

Generally, **2:52**

IMPULSE CONTROL DISORDERS

Generally, **2:53**

INDIGENT PERSONS

In forma pauperis proceedings in federal district court appeals, **10:7 to 10:10**

INITIAL DETERMINATIONS

Generally, **2:4 to 2:9, 3:6**

Children's Supplemental Security Income, **2:7**

Disabled adult child benefits, **2:9**

Disabled widow's benefits, **2:8**

Social Security Disability Insurance, **2:5**

Supplemental Security Income, **2:6**

INSTALLMENT PAYMENTS

Past-due SSI benefits, **2:18**

INTERIM BENEFITS

Disability and SSI cases, **3:5**

INTERPRETERS

Hearings, **3:18**

INTERROGATORIES

Checklist, **7:10**

To doctor, **9:50**

To vocational expert with cover letter, **9:51**

INTERVIEW WITH CLIENT

See index heading LAW OFFICE MANAGEMENT

JUDGMENT ON PLEADINGS

Federal district court appeals, **10:10**

INDEX

LAW OFFICE MANAGEMENT

- Generally, **4:1 to 4:17**
- AI, Social Security practice, **4:17**
- Attorney fees, Social Security representation
 - generally, **4:4**
- Calendar system of time keeping, **7:34**
- Case analysis checklist, **7:28**
- Case summary sheet, **7:8**
- Client interview and conferences
 - checklist, interview, **7:24**
 - client's background and daily life questionnaire, **7:23**
 - conferences, generally, **4:6**
 - daily life questionnaire, **7:23**
 - file memo, sample interview, **7:25**
 - initial interview questionnaire, **7:20**
 - interview questionnaire, **7:21**
 - pain questionnaire, **7:22**
 - post-conference letter to client, **7:27**
 - preconference letter to client, **7:19**
- Comprehensive management system, considerations for, **4:16**
- Conferences with client. See "Client interview and conferences" under this index heading
- Daily life questionnaire, **7:23**
- Deposition checklist, **7:9**
- Docket control
 - generally, **4:9**
 - form, **7:5**
- Employer, letter requesting information about client, **7:26**
- Expenses
 - docketing, individual file, **7:38**
 - letter to client, **7:36, 7:37**
 - management, **4:11**
- Experts
 - obtaining, generally, **4:14**
 - vocational experts. See index heading VOCATIONAL EXPERTS
- Fee contract forms, **7:29 to 7:33**
- Files and filing systems
 - generally, **4:8**
 - expense docketing, **7:38**

LAW OFFICE MANAGEMENT —Cont'd

- Files and filing systems—Cont'd
 - interview memo, **7:18**
 - sample interview, **7:25**
 - time keeping, **7:35**
- Forms library, **4:3**
- Hearings
 - checklist, **7:12**
 - preparation, **4:15**
- Initial client inquiries, **4:5**
- Initial contact with Social Security Administration, **4:10**
- Initial interview questionnaire, **7:20**
- Interrogatory checklist, **7:10**
- Interview with client. See "Client interview and conferences" under this index heading
- Itemized work-performed sheet, **4:13**
- Letters
 - denial, letter informing client of, **9:76**
 - employer, letter requesting information about client, **7:26**
 - expense letter to client, **7:36, 7:37**
 - favorable decision, letter informing client of, **9:74**
 - legal aid association, letter requesting referrals, **7:16**
- NOSSCR, **7:3, 7:14**
 - post-conference letter to client, **7:27**
 - preconference letter to client, **7:19**
 - publications, letter to United States Government Printing Office requesting, **7:2**
 - specialties listing services, letter to, **7:15**
- Library, **4:2**
- Master case file list, **7:4**
- Monthly tally, **7:6**
- NOSSCR
 - letter requesting membership, **7:3**
 - referrals, letter requesting, **7:14**
- Office management, **4:7**
- Pain questionnaire, **7:22**
- Post-conference letter to client, **7:27**
- Preconference letter to client, **7:19**

LAW OFFICE MANAGEMENT
—Cont'd

Publications, letter to United States Government Printing Office requesting, **7:2**

Referrals

- legal aid association, letter requesting referrals, **7:16**
- letter to NOSSCR requesting, **7:14**
- specialties listing services, letter to, **7:15**

Request for SSA forms, **7:1**

Research materials, **4:2**

Research sheet, **7:7**

Sms or telephone authorization, **7:33**

Social Security contingent fee agreement, **7:32**

Subpoena, request for issuance of, **7:11**

Telephone checklist, **7:17**

Time management

- generally, **4:11**
- calendar system, **7:34**
- file-notation system, **7:35**
- methods of time keeping, **4:12**

Vocational experts

- generally, **7:39 to 7:50**
- for detailed treatment, see index heading VOCATIONAL EXPERTS

LETTERS

Denial, letter informing client of, **9:76**

Disability Determination Services (60 day diary), **9:49**

Favorable decision, letter informing client of, **9:74**

Five-day letter to judge, **9:82**

Hospital, to, **8:4**

Law office management. See index heading LAW OFFICE MANAGEMENT

Medical records, requesting, **8:3**

Medical report, letter to doctor requesting, **8:5, 8:6**

Petition, letter to administrative law judge, letter enclosing, **9:83**

Vocational experts, **7:39, 7:41**

LIBRARY

Forms, **4:3**

LIBRARY—Cont'd

Law office, **4:2**

MALIGNANT NEOPLASTIC DISEASES

Generally, **2:35**

MEDICAL OPINION FORM

Base template, **8:13**

Supplemental question

- absence from work, **8:15**
- mental, **8:17**
- off task, **8:14**
- repetitive use, hands or arms, **8:16**

MEDICAL RECORDS

Generally, **5:1**

Abstract of, **5:8**

Analysis of, **5:7**

Checklist for analyzing medical records, **8:10**

Client request for records under HITECH Act, **8:11**

Diagnosis form, **8:8**

Evaluation of medical and other opinion evidence, **5:9**

Forms

- checklist for analyzing medical records, **8:10**
- client request for records under HITECH Act, **8:11**
- diagnosis, **8:8**
- history, **8:8**
- letter to hospital, **8:4**
- medical authorization, **8:1**
- present physical disabilities, **8:9**
- psychiatrist or psychologist, letter requesting report, **8:7**
- records, letter to doctor requesting, **8:3**
- report, letter to doctor requesting, **8:5, 8:6**

History, form for, **8:8**

Letter to doctor requesting, **8:3**

Medical authorization forms, **8:1**

Medical opinion form

- base template, **8:13**
- supplemental question

 - absence from work, **8:15**
 - mental, **8:17**

INDEX

MEDICAL RECORDS—Cont'd

- Medical opinion form—Cont'd
 - supplemental question—Cont'd
 - off task, **8:14**
 - repetitive use, hands or arms, **8:16**
- Model attestation
 - reproductive health, protected health information, **8:2**
- Present physical disabilities, form for, **8:9**
- Psychiatrist or psychologist, letter requesting report, **8:7**
- Reports. See index heading **MEDICAL REPORTS**
- Requesting, **5:11**
- Request letter
 - sample HIT MER, **8:12**
- Sample questions to medical provider on supportability, **8:18**
- Treating physician (source) rule, **5:10**

MEDICAL REPORTS

- Adult with allegation of human immunodeficiency virus (HIV) infection (SSA-4814-F5), **9:40**
- Capability to manage benefits (SSA-787), **9:34**
- Child with allegation of human immunodeficiency virus (HIV) infection (SSA-4815-F6), **9:39**
- Letter to doctor requesting, **8:5, 8:6**
- Medications (HA-4632), **9:69**
- Recent medical treatment (HA-4631), **9:68**

MEDICATIONS

- Generally (HA-4632), **9:69**

MENTAL/ PSYCHOLOGICAL/ PSYCHIATRIC IMPAIRMENTS

- Generally, **2:45 to 2:56**
- Anxiety, **2:48**
- Autism, **2:47**
- Autism spectrum disorder, **2:49**
- Depression, **2:47**
- Down syndrome, **2:56**
- Eating disorders, **2:51**
- Hypochondriasis, **2:52**

MENTAL/ PSYCHOLOGICAL/ PSYCHIATRIC IMPAIRMENTS—Cont'd

- Hysteria, **2:52**
- Impulse control disorders, **2:53**
- Migraine headaches, **2:31**
- Neurodevelopmental disorders, **2:50**
- Neurological impairment and mental harm, **2:31**
- Obsessive-compulsive disorders, **2:48**
- Personality disorders, **2:53**
- Primary headache disorders, **2:32**
- Psychotic disorders, **2:47**
- Residual functional capacity assessment (SSA-4734-BK-SUP), **9:42**
- Schizophrenia spectrum, **2:47**
- Somatic symptom disorders, **2:52**
- Stressor-related disorders, **2:54**
- Trauma-related disorders, **2:54**
- Traumatic brain injuries, **2:46**

MIGRAINE HEADACHES

- Generally, **2:31**

MISLEADING STATEMENTS

- Penalties for, **2:2**

MOTIONS

- Federal district court appeals. See index heading **FEDERAL DISTRICT COURT APPEALS**

MUSCULOSKELETAL IMPAIRMENT

- Generally, **2:25**

NEURODEVELOPMENTAL DISORDERS

- Generally, **2:50**

NEUROLOGICAL IMPAIRMENTS

- See index heading **MENTAL/ PSYCHOLOGICAL/ PSYCHIATRIC IMPAIRMENTS**

NOSSCR

- Letter requesting membership, **7:3**
- Referrals, letter requesting, **7:14**

NOTICE

- Appointment of representative, **9:53**
- Continuing disability, notice of review, **9:79**
- Hearings, waiver of timely written notice, **9:63**
- Substitution of party upon death of claimant (HA-539), **9:61**

OBESITY

- Generally, **2:34**

OBSESSIVE-COMPULSIVE DISORDERS

- Generally, **2:48**

OHA POLICY STATEMENT

- Use of language supplied by claimants and representatives in preparation of fully favorable decisions (February 1995), **3:15**

OVERPAYMENT

- Waiver request (SSA-632-BK), **9:44**

OVERVIEW OF SOCIAL SECURITY PROCESS

- Generally, **1:0.50 to 1:26**
- Americans with Disabilities Act, applicability to disability determinations, **1:23**
- Appointed Representative Service (ARS), **1:6**
- Appointment of legal representative, **1:5**
- Basic Social Security programs, **1:21**
- Best practices for claimants' representatives, SSA's suggestions for, **1:6**
- Collecting fees, **1:9 to 1:18**
- COVID-19 procedures implemented by SSA, **1:0.50**
- Direct deposit, **1:3**
- Disability claim application evaluations, **2:12**
- Disclosure of records and information, **1:4**
- Electronic services, use of, **1:5**
- Equal Access to Justice Act, **1:7**
- Evaluation of applications for disability benefits, **2:12**

OVERVIEW OF SOCIAL

SECURITY PROCESS—Cont'd

- Fee agreements, **1:12 to 1:14, 1:19**
- Fee authorization process, overview of, **1:8**
- Independent agency, SSA as, **1:2**
- Legal representative's role; Appointment; Rules of conduct, **1:5**
- Multiple representatives, **1:19**
- Rules of conduct, **1:5**
- Sequential evaluation process, **2:12**
- Termination of DSI program in Region 1, **1:22**
- Travel expenses, **1:26**
- Unemployment insurance benefits, **1:25**
- Uniformity rules, **1:22**
- Update to overpayment recovery procedures, **1:0.25**
- Workers' compensation offset, **1:24**

PAIN

- Impairment, **2:22**
- Questionnaire, **7:22**

PANDEMIC

- Procedures implemented by SSA, **1:0.50**

PARTNERSHIPS

- Questionnaire (SSA-7104), **9:20**

PAYEES

- See index heading REPRESENTATIVE PAYEES
- Advance designation of representative payee (SSA-4547), **9:33**
- Request to be selected as (SSA-11-BK), **9:32**

PENALTIES

- False or misleading statements, **2:2**

PERSONALITY DISORDERS

- Generally, **2:53**

PHYSICIANS

- Generally, **5:1**
- Consultative examinations, **5:4**
- Effective use of, **5:3**
- Independent medical examinations, **5:5**

INDEX

PHYSICIANS—Cont'd

- Medical records and opinions,
requesting, **5:11**
- Psychiatric or psychological profes-
sional, **5:6**
- Records. See index heading MEDICAL
RECORDS
- Relationship with, **5:2**
- Treating physician (source) rule, **5:10**

PRACTICE GUIDE

- Appeal and review, walkthrough of
online application
third party, **3:32**

PRE-HEARING ANALYSIS

- Generally, **9:67**

PRESCRIBED TREATMENT

- Need to follow, **2:60**

PRIORITY CASES

- Procedure in Social Security cases,
3:24

PROBATION VIOLATORS

- Eligibility restrictions, **2:20**

PROCEDURES

- Disability claims, generally, **2:1 to
2:60**
- Social Security cases, generally, **3:1
to 3:31**

PSYCHOLOGICAL OR PSYCHIATRIC IMPAIRMENTS

- Generally, **2:45 to 2:56**
- For detailed treatment, see index
heading MENTAL/ PSYCHOLOGICAL/
PSYCHIATRIC IMPAIRMENTS

PSYCHOTIC DISORDERS

- Generally, **2:47**

PUBLICATIONS

- Letter to United States Government
Printing Office requesting, **7:2**

RECONSIDERATION

- Generally, **3:7**
- Attorneys' fees, **1:15**
- Experimental elimination phased out,
3:8

RECONSIDERATION—Cont'd

- Hearings, **3:19**
- Request (SSA-561-U2), **9:41**

RECORDS

- Access to, **1:4**
- Authorization for release. See index
heading AUTHORIZATION OF RELEASE
OF INFORMATION
- Correction of, **1:4**
- Disclosure of, **1:4**
- File
letter requesting, **9:52**
- Medical records. See index heading
MEDICAL RECORDS

RECOVERY PROCEDURES

- Overview of social security process,
update to overpayment, **1:0.25**

REFERRALS

- See index heading LAW OFFICE MANAGE-
MENT

REMAND

- Generally, **3:25, 3:26**

REPORTS

- Adult (SSA-3368-BK), **9:22**
- Child (SSA-3820-BK), **9:24**
- Continuing disability review report
(SSA-454-BK), **9:78**
- Disability report—Appeal (SSA-
3441-BK), **9:62**
- Medical. See index heading MEDICAL
REPORTS
- Special wage payments, employer
report of (SSA-131), **9:15**
- Update report (SSA-455), **9:23**

REPRESENTATIVE PAYEES

- Generally, **2:18**
- Agreement to appearing by online
video, **9:88**
- Hearing format objection/consent
statement, **9:90**
- Objection to appearing by audio or
agency video, **9:88**
- Representative registration, **9:87**

RESEARCH

- Forms library, **4:3**

RESEARCH—Cont'd

Materials, **4:2**

Sheet, **7:7**

RESIDUAL FUNCTIONAL CAPACITY

Assessment, generally (SSA-4734-BK-SUP), **9:42**

Physical functional capacity assessment (SSA-4734-BK), **9:43**

Supplemental questionnaire as to, **9:36**

Vocational considerations, **2:40**

RESPIRATORY IMPAIRMENT

Generally, **2:27**

RETROACTIVE BENEFITS

Disability and SSI cases, **3:5**

RIGHT TO COUNSEL

Generally, **3:10**

For detailed treatment, see index heading APPOINTMENT OF REPRESENTATIVE

RULES OF CONDUCT

Representatives, **1:5**

SCHIZOPHRENIA SPECTRUM

Generally, **2:47**

SELF-EMPLOYMENT

Farming questionnaire (SSA-7156), **9:17**

Substantial gainful activity, special rules in evaluating, **2:14**

SELF-SUFFICIENCY

Medical source opinion of patient's capability to manage benefits (SSA-787), **9:34**

Self-support plan (SSA-545-BK), **9:45**

SEQUENTIAL EVALUATION PROCESS

Generally, **2:12**

SERVICE OF PROCESS

Generally, **3:2**

SEVERE IMPAIRMENT

Generally, **2:21**

SICKLE CELL

Generally, **2:35**

SKIN DISORDERS

Generally, **2:30**

SMS OR TELEPHONE

Authorization, **7:33**

SOMATIC SYMPTOM DISORDERS

Generally, **2:52**

STATE AGENCIES

Functions, **2:11**

STATEMENT OF CLAIMANT

Generally, **9:3**

Direct deposit information, **9:4**

Form (SSA-795), **9:5**

Representation, **9:54**

STATEMENT OF EARNINGS

See index heading EARNINGS AND BENEFIT ESTIMATE STATEMENT

STRESSOR-RELATED DISORDERS

Generally, **2:54**

SUBPOENAS

Generally, **3:9**

Form (HA-511), **9:66**

Request for issuance of, **7:11**

SUBSTANTIAL GAINFUL ACTIVITY

Special rules for self-employed, **2:14**

Vocational considerations, **2:13**

SUBSTITUTION OF PARTY

Death of claimant, notice of (HA-539), **9:61**

SUMMONS

Federal district court appeals, **10:5**

TELEPHONE

Checklist, **7:17**

TICKET TO WORK AND WORK INCENTIVES IMPROVEMENT ACT OF 1999

Generally, **2:59**

INDEX

TIME MANAGEMENT

See index heading **LAW OFFICE MANAGEMENT**

TRAUMA-RELATED DISORDERS

Generally, **2:54**

TRAVEL EXPENSES

Generally, **1:26**

TRIAL WORK PERIOD

Generally, **2:15**

UNEMPLOYMENT INSURANCE BENEFITS

Generally, **1:25**

VISUAL DISORDERS

Generally, **2:57, 2:58**

VOCATIONAL CONSIDERATIONS

Generally, **2:38 to 2:42**

Composite jobs, **2:39**

Expert testimony. See index heading
-VOCATIONAL EXPERTS

Medical-vocational guidelines, **2:42**

Reentitlement period, **2:15**

Residual functional capacity, **2:40**

Substantial gainful activity, **2:13**

Ticket to Work and Work Incentives
Improvement Act of 1999, **2:59**

Trial work period, **2:15**

When to consider, **2:38**

VOCATIONAL EXPERTS

Generally, **6:1 to 6:7, 7:39 to 7:50**

Appointment, letter to administrative
law judge requesting, **7:44**

Cases requiring, **6:2**

Client questionnaire for new clients
with third party application
questions, **7:50**

Content of testimony, **6:3**

Credentials checklist, **7:43**

Cross-examination of, **9:73**

Data sheet, **7:46 to 7:49**

Fees, **6:6**

VOCATIONAL EXPERTS—Cont'd

File memo on vocational data, **7:50**

Letter to, **7:41**

Letter to source of, **7:39**

Names, letter to Social Security
Administration requesting, **7:40**

Professional qualifications sheet,
7:42

Questionnaire for, **7:45**

Scope of testimony, **6:3**

Testimony, **6:4**

Tools and evidence to challenge
testimony, **6:5**

WAIVER

Examination of additional evidence,
9:72

Overpayment request (SSA-632-BK),
9:44

WITHDRAWAL OF APPLICATION

Request for (SSA-521), **9:8**

WITNESSES

Lay witnesses, **6:7**

Vocational experts. See index head-
ing VOCATIONAL EXPERTS

WORKERS' COMPENSATION

Offset, **1:24**

Questionnaire (SSA-546), **9:13**

WORK REPORTS

Background (HA-4633), **9:70**

Employee (SSA-821-BK), **9:31**

History of work report (SSA-3369-
BK), **9:29**

Self-employed person (SSA-820-F4),
9:30

WORLD WAR II VETERANS

Application for special benefits for
(SSA-2000-F6), **9:48**

YOUNG ADULTS

SSI benefits, application of standards
to persons 18 to 25 years old
applying for, **2:17**