

SSDI Application

What to Gather First

Collect these 8 document categories before you file.

Applying for Social Security Disability benefits is a long process — and getting organized from the start can prevent weeks of delays. The SSA will ask for detailed documentation across several categories. This checklist tells you what to collect before you begin the application, so you're not scrambling for records mid-process.

Medical Records

The most critical part of your application.

- Doctor's reports and treatment notes** — From every provider who has treated your condition
- Hospital discharge summaries** — For any inpatient stays related to your disability
- Lab results and imaging reports** — Blood work, MRIs, X-rays, CT scans
- Mental health records** — If applicable — therapist notes, psychiatric evaluations

Work History

The SSA needs to understand your employment background.

- W-2s from the last 15 years** — Or as many as you can locate
- Employment verification letters** — Dates, job titles, and duties for each position

Financial Documents

Income and benefit information.

- Current bank statements** — All checking and savings accounts
- Current benefit statements** — Workers' comp, private disability, VA benefits — if any

Personal Documents

Identity and residency verification.

- Birth certificate or proof of age** — Original or certified copy

- Proof of citizenship or residency** — Passport, naturalization certificate, or immigration documents

Notes

Need more help organizing your transition?

Lumeway offers step-by-step worksheets, planning checklists, and a free Transition Navigator to help you understand what comes next — one step at a time.

Visit lumeway.co

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