



Advocate Pathway Solutions
GUIDING YOU TO THE BENEFITS YOU DESERVE



SSDI/SSI Eligibility Checklist

Work & Financial Requirements

- ☐ I have stopped working (or will stop soon) due to a medical condition.
- ☐ My condition is expected to keep me from working for at least 12 months.
- ☐ I have worked at least 5 of the last 10 years (for SSDI).
- ☐ My bank account/resources are under \$2,000 (for SSI).

Medical Documentation

- ☐ I am seeing a doctor for my condition(s).
- ☐ I have recent medical records (within the past 6–12 months).
- ☐ I can provide hospital or specialist records if needed.
- ☐ I have a list of all medications and treatments.

Application & Claim Status

- ☐ I have not filed a claim yet OR I filed but was denied in the past 60 days.
- ☐ I am not currently represented by another attorney/advocate.
- ☐ I understand that eligibility does not guarantee approval.

Case Preparation

- ☐ I know my primary medical conditions that prevent me from working.
- ☐ I can explain how these conditions affect my daily activities and ability to work.
- ☐ I have reviewed common mistakes when filing (see Advocate Pathway Solutions Blog, “Top 5 Mistakes People Make When Filing for Social Security Disability Benefits”).

I am ready to speak with an Advocate Pathway Solutions representative to strengthen my case.

This checklist is based on general Social Security guidelines. Completing it does not guarantee approval or denial. The Social Security Administration makes all final determinations.

Next Step: Contact Advocate Pathway Solutions



**ADVOCATE PATHWAY
SOLUTIONS**

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