SOCIAL SECURITY DISABILITY REPRESENTATIVE / 01

MAP THE MATTER WITHOUT PRIVATE DETAILS

Use neutral labels and the stage as you understand it. The representative must verify the record privately.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Matter stage as currently understood / representative verifies

Notice A / title or category only / no claim number

Prior Social Security contact / date label / no private detail

Existing or former representative status / neutral label

Consultation goal / decision or question to discuss

Timing concern to raise privately / no deadline calculation

Preparation only. Not legal, benefits, disability, medical, evidence, filing, appeal, deadline, fee, tax or financial advice. No attorney-client relationship. Keep claim, medical and identity details private.

SOCIAL SECURITY DISABILITY REPRESENTATIVE / 02

ORGANIZE RECORD CATEGORIES AND HANDOFF

List categories and custody only. Keep actual notices, medical records, work history and correspondence in a secure channel approved by the representative.

Notice and correspondence categories / where held

Medical-record categories / no diagnoses or details

Work, education or activity record categories / no contents

Prior filing, hearing or appeal record categories / if known

Secure exchange method and access responsibilities

Missing, duplicated or uncertain record group to discuss

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SOCIAL SECURITY DISABILITY REPRESENTATIVE / 03

CHECK CONSULTATION READINESS

Tick what is organized. These checks do not establish eligibility, evidence sufficiency, a filing path or a deadline.

- [ ] Notices, records and contacts use neutral labels
- [ ] The current stage is marked as unverified
- [ ] Claim numbers, identities and medical details stay outside
- [ ] Record categories are listed without private contents
- [ ] Existing representative status is ready to discuss privately
- [ ] Secure document exchange is ready to confirm
- [ ] Scope, responsibilities and communication will be written
- [ ] Eligibility, evidence, forms and deadlines remain for qualified review

Open stage, notice or representation question / owner

Private record or secure-intake step still needed

Missing scope, communication or written fee-process detail

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SOCIAL SECURITY DISABILITY REPRESENTATIVE / 04

QUESTIONS FOR THE REPRESENTATIVE

Record the answer and where it appears in the proposed engagement or current official information.

Stage: how will you verify the matter stage and needed private review?

Scope: what work and proceedings are included or excluded?

Appointment: how are existing representatives and transitions handled?

Records: what is requested, and how will secure exchange work?

Communication: who contacts whom, and how are updates documented?

Terms: how are fees, authorization, changes, ending and handoff written?

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SOCIAL SECURITY DISABILITY REPRESENTATIVE / 05

COMPARE THE SAME ENGAGEMENT BRIEF

Use Representative A and B. Clarify unlike stage, scope, record or fee-process assumptions before comparing proposals.

Representative A / B / consultation dates / shared brief

Relevant experience, stage review and representation scope - A / B

Secure intake, responsibilities and communication - A / B

Written fee process, exclusions, ending and file handoff - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Social Security Disability Attorney request. Share a non-confidential stage, record-category and engagement brief so participating pros can compete with proposals. Compare relevant experience, representation scope, secure-intake process, responsibilities, communication, written fee process, exclusions and fit. Do not include claim or medical details; a private representative review is needed before legal advice or engagement.

One request. Every pro's best offer.

Start a request

Participation varies. A private conflicts check, secure record review and qualified representative assessment are needed before legal advice or engagement.

Planning guide: https://www.pickyourpro.ai/services/attorney-social-security-disability

Social Security Administration: Representing SSA Claimants (official reference)

Social Security Administration: Your Right to Representation (official reference)

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