

Checklist for Applying for Social Security Disability and Supplemental Security Income Benefits due to Early-Onset (Younger-Onset) Alzheimer's Disease

(Effective February 27, 2010)

Both programs provide for monthly benefit checks and are administered by the Social Security Administration.

- **Social Security Disability Programs (SSDI)** - An applicant must have sufficient work credit, be unable to work and meet the disability criterion for early-onset (younger-onset) Alzheimer's disease. Family members (for example, a spouse or minor child) may also be eligible to receive benefits under these programs based on the applicant's work record.
- **Supplemental Security Income (SSI)** – An applicant must be aged, blind or **disabled** and have limited income and assets.
- While the programs are different, SSA uses the same criterion for determining whether an applicant is disabled due to early-onset (younger-onset) Alzheimer's disease.

How to Apply –

- In person at your local SSA office. (**Strongly Recommended**) Applicants should call 1-800-772-1213 to schedule an appointment. Do not walk-in for service without an appointment.
- By telephone by calling SSA's toll-free telephone number 1-800-772-1213. If you are deaf or hard of hearing, you can call SSA at TTY 1-800-325-0778.
- Online at <http://www.socialsecurity.gov/applyfordisability/adult.htm>

Important Tips When Applying -

- Do not delay applying for SSDI benefits. You should apply for benefits if you have early-onset (younger-onset) Alzheimer's disease and are unable to work. You may lose substantial benefits by waiting to apply.
- When asked by the SSA claims representative what the disabling condition is, specify "early-onset Alzheimer's disease," not just Alzheimer's disease.
- Many applicants receive help with the application process from their families, close friends or professionals.

Information Needed - In order to apply for SSDI or SSI benefits, the following information needs to be obtained and documents completed, either in person or online:

- Application for SSDI benefit (attach link to SSA)
 - There is no online SSI application at this time
- Medical Release Form (SSA-827) (attach link to SSA)
- Adult disability report (attach link to SSA or document)
- Medical and Job Worksheet – optional but very helpful for interview (attach link to SSA or document)
- Original or certified copy of your birth certificate
 - If born in another country, proof of age, and U.S. citizenship or legal residency
- Original or certified copy of military discharge papers, if you were in the military
- If you worked, a copy of the W-2 from last year or if self-employed, a copy of the federal tax return with Schedules C and SE
- Workers' compensation information, if applicable
- Social Security numbers for spouse and minor children, if applicable
- Your checking and/or savings account numbers, if you have them
- Name, address and phone number of a person SSA can contact if unable to reach you

Medical Information Needed - to prove that you have been diagnosed with early-onset (younger-onset) Alzheimer's disease:

- You will need the name, address and telephone number of your health care providers, including primary physician, neurologist, neuropsychologist and/or psychiatrist.
- You will need the name and dosage information for all the medications that you are taking or have taken, especially for the early-onset Alzheimer's disease.
- If you can, you should collect medical records from your health care providers, including primary physician, neurologist, neuropsychologist and/or psychiatrist. It is very helpful and important for the health records to show that there is progressive decline in function or test scores over time.
 - If you do not have the medical records, SSA will help obtain them for you but this may delay the determination process.
- Pertinent clinical information which should be included in the medical records, if available, includes: history of onset (approximate time when symptoms began); description of cognitive and functional impairments at home and at work; results from neurological, cognitive or neuropsychological examinations; and results from neuroimaging.
- Activities of daily living report or similar report completed by a relative or caregiver
- Documentation of dementia by standardized testing, such as Clinical Dementia Rating (CDR) with a score of ≥ 1 , Mini Mental State Exam (MMSE) of ≤ 24 , or equivalent test, is helpful.

After You Apply –

The Social Security office will assist you in filing the application for benefits, but the actual medical decision is made by a disability case examiner in your state, usually working for an agency called the "Disability Determination Service" or "Disability Determination Bureau." If

you receive written correspondence or a phone call from a disability examiner, that person is working on your claim and requires your cooperation.

Helpful Resources

The SSA has a wealth of information on its webpage at www.socialsecurity.gov

Specifically, there is a Social Security Disability Planner at <http://www.socialsecurity.gov/dibplan/index.htm>