

## Appointment Protocol SSD SSD Social Security Disability

*Mail this form, your records and payment. Ellis Clinic will then call you to set up an appointment.*

First Middle Last Name \_\_\_\_\_  
 Full Mail Address \_\_\_\_\_  
 Contact Phone \_\_\_\_\_ E-mail \_\_\_\_\_  
 Social Security# \_\_\_\_\_ Date of Birth \_\_\_\_\_  Male  Female  
 Work Status:  Still Working or Date Last Worked \_\_\_\_\_ Attorney/Rep \_\_\_\_\_

### Conditions, Diseases and Injured Body Parts That Make it Difficult to Work

List the most disabling on top, i.e. 1. Arthritis hands 2. Surgery Left Shoulder 3. Back with nerve pain in legs 4. Surgery left knee 4. Diabetes.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

Additional conditions on separate page. Extensive conditions and records may require additional charge.

**Payment Method**  **Check payable to Ellis Clinic, PC**  **MasterCard**  **Visa** (No Am Express or Discover)

\$ \_\_\_\_\_ \$500 SSD Social Security Disability Only. Not a federal government employee.

\$ \_\_\_\_\_ Payment for Summary List by Ellis Clinic. \$50 per inc if records in order.

Date \_\_\_\_\_

Card# \_\_\_\_\_ Exp \_\_\_\_/\_\_\_\_ Security Code# \_\_\_\_\_

Name on Card \_\_\_\_\_  
Card \_\_\_\_\_

Address \_\_\_\_\_ Card Zip Code \_\_\_\_\_

### Instructions for the Order of Records and Summary List on Page 2.

## Instructions for Order of Records Social Security Disability

**Send Only Copies!** Records Are Destroyed and Are Not Returned.

Send only pertinent records:

- Usually, only an Operative Report but not all the hospital records will be enough.
- Usually, you do not need every physician visit record for followup medical maintenance.

### ORDER of RECORDS

◆ **Page 1: Appointment Protocol SSD on Top**

◆ **Typed Summary List of Records**

- Important! Your Summary List is attached to your report. See the example below.
- You can ask Ellis Clinic to type your Summary List. Fee \$50 per inch of records if records in order.

### Below Medical Records Sections:

- ◆ Insert a sheet of colored paper or a tab between each section.
- ◆ Within each section put the most recent records on top.
- ◆ No separate list for each of your conditions, i.e. Operation for all conditions are listed together.
- ◆ Staple or clip together the pages of each operation, test, each physician, etc.

1. **Operations:** Only the Operative Report.
2. **Tests:** MRI, EMG/Nerve Conduction Study, Lab Blood test if positive for a disease, etc.
3. **Hospital Records:**
  - If surgery, then usually only the Operative Report will be enough.
  - If no surgery, then usually only the Discharge Summary will be enough.
4. **Physician Records:** Reports, Office Notes, etc.
5. **Optional - Non Physician Records:** Physical Therapy, Functional Capacity Exam.

## Example of a SSD Summary List

### Medical Records: John Q. Doe, SSN 123-45-6789

1. Operations
  - a. 11/2/2018 Right shoulder arthroscopic surgery.
  - b. 10/15/2017 Lumbar spine fusion L5-S1.
2. Tests:
  - a. 4/4/2018 MRI Right Shoulder
  - b. 4/5/2017 MRI Lumbar spine
  - c. 3/3/2010 blood test:
    - i. Positive Rheumatoid Factor
    - ii. Low TSH
3. Hospital Records:
  - a. 7/6/2003 - 7/4/2003 Mercy Hospital Discharge Summary: Motorcycle wreck.
4. Physician Records
  - a. 11/8/2018 - 5/4/2015 Ima Cutter, DO
  - b. 6/8/2017 - 6/6/2013 Marcus Welby, MD