

Lexington Training Agenda

- Communicating with the Client
- 3-way Videoconferencing
- A Sample Checklist
- The Record
- Common SSA Forms you will encounter
- Sample Correspondence
- Hearing procedures
- Objections
- Developing the Record
- Common Case types and Issues
- Federal Court Appellate Strategies

Communicating with the Client

- Initial Interview
- Medical Evidence Review
- Prehearing Preparation Interview
- Hearing

3-way Videoconferencing

- ▣ What is it?
- ▣ How to request it
- ▣ Making it work
- ▣ Getting your client comfortable

A Sample Checklist

Accessing the Record

Social Security Online
www.socialsecurity.gov

Business Services Online
BSO Welcome | BSO Information | Keyboard Navigation

Log In to Online Services

For your security, please log out of the application and close all Internet windows when you are finished.

Online Services Availability

- Monday-Friday: 5 AM - 1 AM ET
- Saturday: 5 AM - 11 PM ET
- Sunday: 8 AM - 11:30 PM ET

New User?
You must create an account to use this website. Once you do, you will be provided a User ID to log in to our online services.

To create new account you will need to:

- Provide personal information
- Provide contact information
- Create your password and security questions

[Create Log In Account](#)

Did you register with SSA by [phone or paper form](#) and need to create a password?

Existing User?
Please log in below:

User ID:

Password:

[Forgot user ID?](#)
[Forgot your password?](#)

User Certification:
I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I have read & agree to these terms.

www.socialsecurity.gov BSO Welcome | BSO Information | Keyboard Navigation

The Record

- ▣ What's in the Record
- ▣ Supplementing the Record
- ▣ Holding the Record open

Common SSA Forms

- ▣ Appointment of Representative Form 1696
Appeals Council Order
- ▣ ALJ Decision
- ▣ Hearing Notice
- ▣ Bar Code
- ▣ DDS Medical Source Opinions
- ▣ Adult Disability Report and other E Exhibits

Hearing Procedures

- ▣ ALJ Jurisdictional Statement
- ▣ Record Issues
- ▣ Opening Statement
- ▣ Client Testimony
- ▣ Vocational Expert Testimony
- ▣ Closing Argument

Objections

- ▣ Purpose of Objections
- ▣ Presentation at Hearing
- ▣ Rulings

Developing the Record

- ▣ Medical Records past and present
- ▣ Current RFC forms
- ▣ The Junk File
- ▣ CDR's
- ▣ Consultative Examinations
- ▣ Medical Expert Witnesses

Grid Cases

- ▣ The “Grids”
- ▣ (h)(1) - age 18 through 49
- ▣ Transferable skills and the vocational expert
- ▣ Nonexertional impairments and the vocational expert
- ▣ Excluded medical report and the vocational expert
- ▣ Time off task

Sample Documents

- ▣ Intake Memo
- ▣ SSA Cover Letter
- ▣ 3-way Bridge Video Memo
- ▣ Medical Release
- ▣ Objections
- ▣ Request to Develop Record
- ▣ Case Review
- ▣ Preliminary Matters

Appeal Strategies

Questions ?

