CHECKLIST – Eric Conn Redeterminations

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| --- | --- | --- | --- |
| ITEM | STAFF | DUE | NOTES |
| Reserve video time with AppalReD |  |  |  |
| Call client – make appointment for initial interview |  |  |  |
| Send Completed and Signed 1696 and Medical Release to AppalReD for client interview |  |  |  |
| Confirm initial interview appointment with client |  |  |  |
| Initial Interview  Complete interview worksheet |  |  |  |
| Set up file |  |  |  |
| FAX Initial correspondence with 1696 to ODAR |  |  |  |
| Client Correspondence - Confirm Representation |  |  |  |
| Call ODAR – confirm representation & get bar code |  |  |  |
| Download ERE file |  |  |  |
| Make appointment with client for med review |  |  |  |
| Review ERE Administrative Record |  |  |  |
| Interview client  Complete med review worksheet |  |  |  |
| Order medical records |  |  |  |
| Review Hearing Notice |  |  |  |
| Make Appointment with client for pretrial interview |  |  |  |
| Draft and file Objections |  |  |  |
| Draft and file Request to Develop Record |  |  |  |
| Submit medical records to date |  |  |  |
| Draft and file pretrial brief |  |  |  |
| Confirm pretrial interview with client |  |  |  |
| Pretrial Interview |  |  |  |
| Hearing Preparation |  |  |  |
| Draft post hearing memorandum for file |  |  |  |
| Secure and submit outstanding medical records |  |  |  |
| Review Hearing Decision |  |  |  |
| Contact client re decision |  |  |  |
| File Appeals Council Request for Review  (60-day deadline) |  |  |  |