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

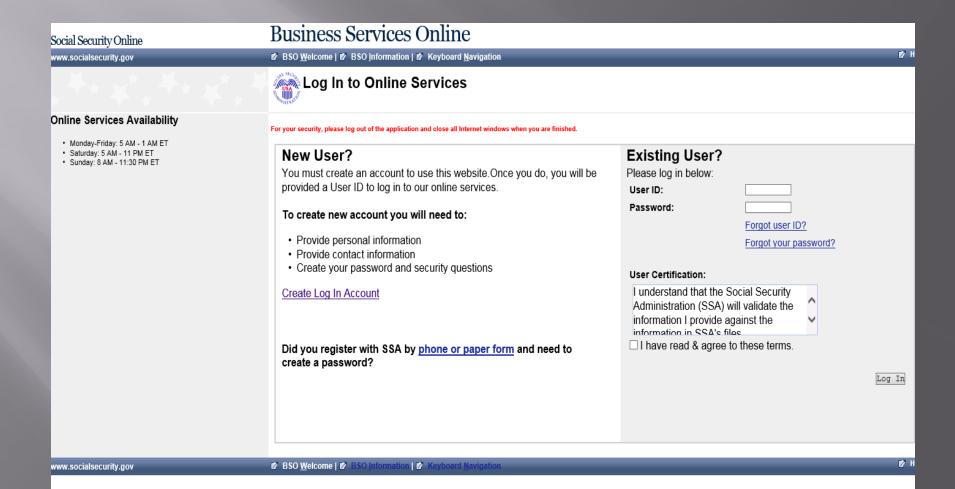
What is it?

- How to request it
- Making it work
- Getting your client comfortable

A Sample Checklist



Accessing the Record



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 <u>Objections</u>
- 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?



