



# WHITMAN-WALKER CLINIC

## Reconsideration Intake and Interview Checklist

- I. Introduce yourself and your role and provide overview for the interview**
  - Explain that you are a trained volunteer who has agreed to take this case on a pro bono basis
  - Let the client know for what law firm you work and how to get in touch with you
  - Briefly review the intake form to ensure information is up-to-date and accurate
  - Give the client a sense of what information you will need
  
- II. Interviewing the Client**
  - A. Completing the Forms (have client sign in interview and complete them later)
    - Appointment of Representative (SSA-1696)
    - Request for Reconsideration (SSA-561)
    - Disability Report – Appeal (SSA-3441)
    - Authorization to Release Information (SSA-821)
    - Attorney/Client or Retainer Agreement (Your law firm form)
    - Consent to Release Information (WWC form)
    - Functional Limitations (WWC form)
  
  - B. Gathering the Information about the Client’s Medical Providers
    - Copy any medical records that the client has brought and return the originals to the client
    - Find out every medical provider/clinic/hospital that the client has seen for his/her medical conditions
    - If the client does not have the exact address of the hospital or clinic, see the hospital/clinic address list in the Social Security Appeals Manual
    - Find out who the client currently receives medical treatment from – does that provider think that the client cannot work?
    - Ask client about all of the symptoms s/he experiences and find out how these symptoms/medical conditions impact the client’s ability to perform his/her activities of daily living – Use the functional limitations form as a guide to assist you. Then type form from your notes. Have client sign a blank copy.
  
- III. Wrapping Up with the Client/Explanation of Next Steps**
  - Remind the client that you will be handling their case – Give the client your business card and contact information
  - Provide the client with a client placement letter, which details contact information
  - Explain that the processing time for this type of appeal is approximately 3-6 months

- Ask the client if s/he has any questions. If not, let the client know that the two of you will need to be in touch every few weeks. Walk the client to the elevator.

#### **IV. Wrapping Up at the Clinic**

- Write your name and law firm on the intake form next to Appeal Assistance Provided By and take the pink copy. The white and yellow copies are to be returned to the Staff Attorney Supervisor.
- Staff Attorney Supervisor will need to provide you with a copy of the volunteer placement letter
- Gather your files and you are finished at the Clinic
- If you have any questions regarding your case or procedures, the Staff Attorney Supervisor is available at the Clinic and after the Clinic by phone.

#### **V. Filing and Supervision on Your Cases**

- File the appeal forms prior to the 60-day deadline  
If the client has already preserved his or her deadline, you should re-submit copies of these forms with your Appointment of Representative form.
- An attorney in your law firm needs to review and supervise your case
- Gather medical records, letters of support from doctors (where necessary), and write a letter brief detailing why the denial of benefits was wrong and how the client qualifies as medically disabled
- File the letter brief and medical records within one month of filing the appeal forms, otherwise you risk SSA/DDS making a decision before they've seen your information
- Provide copies of the filing to your client
- If client is granted benefits, calculate the approximate amount of benefits and follow up with the local SSA office until client receives correct amount of benefits. Then send closing form to WWC.
- If the client is denied benefits, make sure you give them a copy of the SSA denial letter and advise them about their legal deadline to appeal. If the firm is taking the case, complete the WWC closing form with name of person responsible for next level of appeal and send to WWC. If the firm is not taking the case, advise the client to contact WWC as soon as possible for a referral to the DC Bar Pro Bono Program and send 2 copies of the file (not the original) to WWC with the closing form.