

Handy Tips

- The functional information observed and provided at step 2 is critical.
- Observing and describing functional difficulties meets one of the three criteria necessary for a person to qualify for disability under SSA's rules.
- This functional description is included in the Medical Summary Report, the components of which are described in Modules X-XIII.
- Aiming to provide information so a person can be found eligible at step 3 can shorten the process and expedite benefits.
- Steps 4 and 5 require more subjective assessment and add time to the process.
- Case managers need to keep in mind that stating a person has a disability is a *conclusion* based on observations of symptoms and behaviors and what the individual reports. SSA and DDS need to know the *observations* that led to this conclusion, not simply the conclusion.
- The role of the case manager is to collect information, present it clearly, address the three major eligibility criteria, and ensure that all aspects of eligibility are covered comprehensively and accurately.