

Talking Points

- **SSI and SSDI are federal programs that pay cash benefits to recipients; cash can be used to pay for any of life's expenses**
- **If you have ever worked and paid Federal Insurance Contributions Act (FICA) taxes you may be covered and eligible to receive payments (for clients with a known work history)**
- **When you have resources you may find it easier to interact with friends, family, and your community**
- **For more information, visit: <https://www.ssa.gov/planners/disability>**

SSI/SSDI Document Checklist

NOTE: You should try to gather as many of these documents as possible. The SSA understands that some of these documents may be difficult or impossible to obtain for some individuals and they will contact you if they require any additional materials to complete the client's application.

SSA will only accept original documents as proof. No photocopies will be accepted.

Proof of Identity

- Photo ID
- Birth Certificate

Proof of Age

- Public record of birth
- Religious record of birth before 5th birthday

Note: If a public or religious record is unavailable, the following documents can be submitted if they can confirm supplemental evidence: school record; census record; bible or other family record; religious record of confirmation or baptism after 5th birthday; insurance policy; marriage record; employment record; labor union record; fraternal organization record; military record; voting record; vaccination record; delayed birth certificate; passport; immigration record; naturalization record;

- Check here if the type is not a public record or religious record of birth before 5th but one of the other types

Proof of U.S. Citizenship or Lawful Status

One of the following (check which one):

- U.S. passport issued by the Department of State (DOS)
- Certificate of Naturalization
- U.S. Citizen Identification card, issued by INS
- Report of birth abroad of a Citizen of the U.S, issued by DOS
- Certificate of birth, issued by foreign service post
- Certificate of Citizenship issued by INS
- Certificate of Report of Birth issued by DOS
- Proof of sponsorship (if claimant or a dependent is being sponsored)

Proof of Worker's Compensation or State Disability Insurance Benefits

- Benefits letter or check stub

Proof of School Attendance

- Records or statement from the school showing enrollment

Proof of Marriage

For ceremonial marriages, one of the following (check which one):

- Certified copy of the public record of the marriage
- Certified copy of the religious record of the marriage
- Original marriage certificate
- A signed statement from a member of the clergy or public official who performed the marriage
- Other evidence of investigative value: statements of witnesses, newspaper accounts, photos take of ceremony

For common law marriages, one of the following (check which one):

- A statement of common law marriage from the husband, the wife, and a blood relative of each
- If either the husband or wife is dead, a statement of common law marriage from surviving widow or widower and two blood relatives of the decedent
- If both a husband and a wife are dead, a statement of common law marriage from a blood relative of the husband and blood relative of the wife
- Statements from other individuals who know the facts of the common law marriage, and an explanation of why statements from blood relatives are unattainable

Proof of Living Arrangement

- Mortgage statement
- Copy of lease
- Rental loan agreement
- Property agreement
- Deeds or other proof of land ownership
- Proof (statement) of in-kind support or maintenance

Proof of Military Service

- Proof of military pay wages
- Other unspecified military service documents

Proof of Resources

- Bank account statements
- Copies of certificates of deposit
- Copy of stocks or mutual fund certificates
- Copy of bonds in the claimant's name
- Copy of burial contracts
- Copy of life insurance policies
- Vehicle titles, bill of sale, or current registration (if claim of vehicle is not accepted by SSA)

Proof of Self-Employment

- Tax records
- Receipts, costs, and allowable expenses used to determine amount of self-employment income

Proof of Wages (for those whose earning records are not recorded by the SSA or Railroad Retirement Board)

One of the following (check which one):

- W-2
- SSA-7011
- SSA-1002

- Any statement signed by employer
- SSA-4500-U6 (signed by authorized State or local official)

*OR, If one of the above cannot be found, **two** or more of the following (check which ones):*

- Pay envelopes
- Vouchers
- Union records
- Income tax returns
- Records of state unemployment compensation agencies
- Personal records