



SOCIAL SECURITY

Disability Adjudication Policy

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SSA Disability Programs

- **Disability Insurance (SSDI) – 1956**
 - Funded through FICA/SECA tax
 - Eligibility based on covered work record
 - Benefit amount based on previous earnings
- **Supplemental Security Income (SSI) – 1972**
 - Funded through general revenues
 - Eligibility based on need
 - Benefit amount based on total income.
- **Both have same medical and vocational eligibility requirements**
- **Both only for total disability**

How Does SSA Define Disability for Adults?

- The inability to engage in any substantial gainful activity (SGA) because of a medically determinable physical or mental impairment(s):
 - That can be expected to result in death, or
 - That has lasted or that we can expect to last for a continuous period of not less than 12 months.
- In 2024, SGA is considered earnings of \$1,550 or more per month (\$2,590 for blind).

Adult Disability Adjudication Process

Adult five-step sequential evaluation process
(SEP)

- Step 1 Engaging in SGA?
- Step 2 Impairment that is severe & meets duration?
- Step 3 Meets or medically equals a listing?
- Step 4 Impairment(s) prevent past relevant work?
- Step 5 Ability to adjust to other work?

How Does SSA Define Disability for Children?

- A medically determinable physical or mental impairment or combination of impairments that causes *marked and severe functional limitations*, and that can be expected to result in death or that has lasted or can be expected to last for a continuous period of not less than 12 months.
- An impairment(s) causes marked and severe functional limitations if it *meets or medically equals* the severity of a set of criteria for an impairment in the listings, or if it *functionally equals* the listings.

Child Disability Adjudication Process

Child three-step sequential evaluation process (SEP)

Step 1 Engaging in SGA?

Step 2 Impairment that is severe?

Step 3 Meets, medically equals, or functionally equals the listings?

Child Disability Adjudication Process

By "functionally equal the listings," we mean that an impairment(s) must be of listing-level severity; i.e., it must result in "marked" limitations in two domains of functioning or an "extreme" limitation in one domain compared to children of the same age who do not have impairments.

1. Acquiring and using information;
2. Attending and completing tasks;
3. Interacting and relating with others;
4. Moving about and manipulating objects;
5. Caring for yourself; and,
6. Health and physical well-being.

Impairment Severity & Duration

Step 2

At step two, we consider the medical severity of impairments. If you do not have a severe medically determinable physical or mental impairment that meets the duration requirement, or a combination of impairments that is severe and meets the duration requirement, we will find that you are not disabled.

Impairment Severity & Duration

Step 2

- Medically Determinable Impairment (MDI): An impairment(s) must result from anatomical, physiological, or psychological abnormalities that can be shown by medically acceptable clinical and laboratory diagnostic techniques. Therefore, a physical or mental impairment must be established by objective medical evidence from an acceptable medical source. We will not use your statement of symptoms, a diagnosis, or a medical opinion to establish the existence of an impairment(s).

Impairment Severity & Duration

Step 2

- Objective Medical Evidence: Signs, laboratory findings, or both.
- Acceptable Medical Source:
 - Broadly: Licensed Physician, Licensed Psychologist;
 - Within scope of practice: Optometrist, Podiatrist, Speech-Language Pathologist, Audiologist, Licensed Advanced Practice Registered Nurse, or Licensed Physician Assistant.
- Note: once an MDI is established, we consider all relevant evidence.

Impairment Severity & Duration

Step 2

“a severe medically determinable physical or mental impairment that meets the duration requirement”

- Severity: If you do not have any impairment or combination of impairments which significantly limits your physical or mental ability to do basic work activities, we will find that you do not have a severe impairment and are, therefore, not disabled. We will not consider your age, education, and work experience.
- Duration: Unless your impairment is expected to result in death, it must have lasted or must be expected to last for a continuous period of at least 12 months.

The Listing of Impairments

Step 3

- The Listing of Impairments (the listings) describes for each of the major body systems impairments that we consider to be severe enough to prevent an individual from doing any gainful activity, regardless of his or her age, education, or work experience.
 - Or, in the case of children under age 18 applying for SSI, severe enough to cause marked and severe functional limitations.
- The listings are special rules that provide us with a mechanism to identify claims that we should clearly allow.
 - The listings are a “Screen In” step of the sequential evaluation process; no claimant is ever denied disability for failure to meet, or medically equal, the requirements of the listings.
- The listing criteria can be met, medically equaled, or (for children only) functionally equaled.

The Listing of Impairments

Medical Equals

- An impairment (or combination of impairments) is medically equal to a listed impairment in the Listings if it is at least equal in severity and duration to the criteria of any listed impairment.
- Impairment described in the Listings
 - Missing finding or lesser severity: Other findings that are at least of medically equal significance
- Impairment not described in the Listings or Combination of Impairments
 - Analogous listing & findings at least of equal medical significance to the listing

Medical-Vocational Analysis

Steps 4 & 5

- Residual Functional Capacity (RFC):
Determine the most the claimant can still do despite their limitations.
 - Based on all the relevant evidence in the case record and considering all medical determinable impairments (MDIs) even those not deemed severe.

Medical-Vocational Analysis

Steps 4 & 5

- **Step 4:** Can the claimant do past relevant work (PRW) as he or she performed it or as generally performed in the national economy?
- **Step 5:** Can the claimant make an adjustment to other work considering their age, education, and work experience?
 - Sources of occupational requirements information: Dictionary of Occupational Titles (DOT), Occupational Requirements Survey (ORS)/Occupational Information System (OIS)