



THE POTTER AGENCY LLC
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Adult Disability Interview

Use this checklist to get ready for your appointment. Keep your appointment even if you do not have all of the information. We will help you get any missing information.

Check off the applicable items as you get them together for your interview.

- Workers' compensation information, including the settlement agreement, date of injury, claim number, and proof of other disability awarded payment amounts.
- Names and dates of birth of your minor children and your spouse.
- Dates of marriages and divorces.
- Checking or savings account number, including the bank's 9-digit routing number, if you want Direct Deposit for your benefit checks.

MEDICAL AND JOB WORKSHEET – ADULT

Complete this worksheet to get ready for the appointment. You should bring this worksheet to your appointment or have it with you if your appointment is by telephone.

A. Medical Conditions

List all of the physical or mental conditions (including emotional or learning problems) that limit your ability to work. If you have cancer, please include the stage and type. List each condition separately.

CONDITIONS	
1.	
2.	
3.	
4.	
5.	
6.	
7.	

B. If you are not working, when did you stop working?

C. Height without shoes: _____ feet _____ inches Weight: _____ pounds

E. Medicines

Please list any medicines you take and why you take them. If prescribed, please provide the doctor's name.

NAME OF MEDICINE	WHY YOU TAKE IT	PRESCRIBED BY

F. Job History

List the Jobs (up to 5) that you have had in the 15 years before you became unable to work because of your physical or mental conditions. List your most recent job first.

JOB TITLE (e.g., Cook)	TYPE OF BUSSINESS (e.g., restaurant)	DATES WORKED		HOURS PER DAY	DAYS PER WEEK	RATE OF PAY	
		FROM Mo/Yr	TO Mo/Yr			Amount	Frequency



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