



PRO SE / SELF-REPRESENTED GUIDE

# SSDI/SSI Claim Exhibit Guide

Organize medical records, RFC opinions, and daily living evidence for ALJ disability hearings

Social Security disability claims are decided using a five-step sequential evaluation (20 C.F.R. § 404.1520). The ALJ considers whether you are working, whether your conditions are severe, whether they meet a listed impairment, whether you can do your past work, and whether you can do any other work. Your evidence needs to address each step. The strongest claims pair consistent medical records with a treating doctor's residual functional capacity (RFC) opinion that specifically describes your limitations. Under SSR 16-3p, the ALJ evaluates your symptoms based on objective medical evidence and daily activities — not "credibility." This guide helps you organize everything the ALJ needs to see.

## Medical Treatment Records

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## Medical Opinions

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## Function and Activity Evidence

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## Work and Financial Records

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### COMMON MISTAKES TO AVOID

1. Not getting an RFC opinion from your treating doctor — the ALJ weighs this heavily
2. Gaps in treatment history that the ALJ interprets as improvement
3. Understating your limitations on the daily activity questionnaire
4. Not mentioning mental health conditions alongside physical ones
5. Missing the 60-day deadline to request a hearing after a denial (SSA allows some late filings for good cause)

### ORGANIZATION TIPS

- Organize medical records chronologically within each provider — the ALJ reads them this way
- Put your treating doctor's RFC opinion near the front. It is your most important document.
- Tab records by provider so the ALJ can find specific sources quickly
- Include a medication list with side effects documented — drowsiness, fatigue, and concentration problems affect your RFC
- Your daily activity questionnaire should be consistent with your medical records. Contradictions hurt your case.
- If you have both physical and mental conditions, organize them separately with clear labels

## COURTROOM PREPARATION

- ALJ hearings are informal but the judge is evaluating you from the moment you sit down
- Answer questions honestly and specifically — "I can stand for about 10 minutes before the pain starts" is better than "I can't stand very long"
- Know the five-step evaluation. Your attorney (if you have one) should walk you through it.
- If the ALJ asks about daily activities, be consistent with what you wrote on the function report
- The vocational expert will testify about jobs. Listen carefully — your representative can cross-examine.
- Bring your medication bottles if you can. It shows the ALJ your current treatment regimen.
- You have the right to review your file before the hearing. Do it — sometimes records are missing.

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