

# SSDI PHASE CHECKLIST

## Participant:

### SSDI Eligibility

Date:

### Work Status

Pre-employment

Employment

### Trial Work Period (TWP)

Month/Year

- TWP 1
- TWP 2
- TWP 3
- TWP 4
- TWP 5
- TWP 6
- TWP 7
- TWP 8
- TWP 9

### Extended Period of Eligibility (EPE)

Month/Year

- EPE 1
- EPE 2
- EPE 3
- EPE 4
- EPE 5
- EPE 6
- EPE 7
- EPE 8
- EPE 9
- EPE 10
- EPE 11
- EPE 12

Month/Year

- EPE 13
- EPE 14
- EPE 15
- EPE 16
- EPE 17
- EPE 18
- EPE 19
- EPE 20
- EPE 21
- EPE 22
- EPE 23
- EPE 24

Month/Year

- EPE 25
- EPE 26
- EPE 27
- EPE 28
- EPE 29
- EPE 30
- EPE 31
- EPE 32
- EPE 33
- EPE 34
- EPE 35
- EPE 36

# SSDI PHASE CHECKLIST

## SSDI Benefit Termination

Anticipated Date:  Actual Date:

## SSDI - Expedited Reinstatement (EXR)

Application Date:  
 Eligibility Date:

## New Application - SSDI

Application Date:  
 Eligibility Date:

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## DOB:

## Normal Retirement Age (NRA)

Calculate NRA: <https://www.ssa.gov/oact/progdata/nra.html>

Date:

## Social Security Retirement Date

Note that taking early retirement at age 62+ reduces your retirement benefit.

Calculate the effect of early or late retirement: [https://www.ssa.gov/OACT/quickcalc/early\\_late.html](https://www.ssa.gov/OACT/quickcalc/early_late.html)

Date:

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## PROTECTION OF PERSONALLY IDENTIFIABLE INFORMATION:

This form in its uncompleted state is available for downloading and printing.

Sending this form by email or text messaging after any personal data is entered is strictly prohibited. Postal mail and fax are safe and appropriate methods for sending the form after data is entered.