

## Course Description



### FREE TRIAL OVERVIEW

In this free trial, I'm going to introduce you to the little known, poorly understood field of Social Security disability representation. You'll be shown exactly how this service works and how you can earn an outstanding income as an SSA disability advocate.

Along with this free training trial, you'll also be given a free limited trial to our [Olivia](#) case management software. This software will enable you to control an advocacy service from home, office or the beach.

The trial course has four segments. These are Homepage, Description, Announcement and Documents. If you decide to take the full course, you'll quickly discover that the documents area is the most important segment of your training. The documents segment will contain the main body of your training materials including formal lessons. The full version course also contains an Exercise segment. The exercise segment will hold all of your end-of-lesson examinations.

Our training program is the most efficient way to enter the field of non-attorney Social Security disability representation. While designed for a complete novice, our course is extremely comprehensive covering every aspect of the SSA disability process. Our proprietary curriculum is specifically designed to help you achieve four important goals:

1. Start or expand an independent SSA advocacy service.
2. Attract qualified clients.
3. Win 90% or more of the cases you represent.
4. Pass SSA's direct-pay certification examination.

#### **Begin:**

Welcome to the trial version of the Disability Associates business and training program. You can download and print this lesson by clicking here:

I'm Gabriel Scott, CEO and founder of the Disability Associates Corporation and the Advocate Income Network. Over the past three decades, I have developed an extremely effective method for processing Social Security disability claims. I developed this system using the direct input of thousands of former students and

practicing disability advocates. This course reflects my many years of experience and my commitment to providing you with the most dynamic advocate education available covering the full spectrum of this unique industry.

Let's start with the basics!

## **The Right to Represent**

A disability advocate is a specially trained individual who represents those that apply for Social Security disability benefits. As an advocate, you are not practicing law! You do not need to be an attorney, have a special license or anyone's permission to enter this field. The Code of Federal Regulations gives you the right to act as a non-attorney representative in all fifty states if you meet SSA's basic qualifications.

If you have a minimum high school education with advocate training, you can enter this field. However, most advocates are college graduates with many different educational backgrounds. While I don't think any specific background will guarantee success as a disability advocate, certain fields do seem to stand out. Those with backgrounds in medicine, science, legal, human services, business, management, academia, military and government seem to do best. However, I've trained high school grads that went on to enjoy very successful careers in this field.

As a non-attorney advocate, you are limited to representing only Social Security disability cases before the Social Security Administration. You can represent a case on up to four adjudicative levels. SSA has created an entire process for properly representing claims that will be fully explained in our Ultimate course.

## **The Business of Representation**

Regardless of why you want to become an advocate, at some point you'll realize that its greatest financial potential is only achievable when practiced independently. From my perspective, disability advocacy is first and foremost a business. In this business, you are only paid if you win. This means that you need a firm understanding of the disability process and an even firmer understanding of the business.

I assume you're taking this course for at least one of the following reasons:

- 1) To start an independent advocacy service

- 2) Use for self or direct employment
- 3) Add this service to an existing business
- 4) Pass SSA's direct-pay examination
- 5) Bring greater ease and efficiency to the disability process.

If any of the above motives have attracted you to this field, you've found the right training course. While all of the above reasons are valid, note that they all have one thing in common. In order to succeed, you must win cases. Not with blind luck as so many do, but with direct professional intent!

This course is all about learning how to win disability cases with the least amount of work in the shortest period of time. I call it operational efficiency and it is the driving force behind my program. This course focuses on the business and operational aspects of this service ranging from rapid assessments to customer satisfaction.

## **Understanding the Process**

Understanding the disability process is the first step in becoming a successful advocate. However, your knowledge of the disability process is just part of what you'll need to succeed. Disability advocacy is also a business that requires real tools and real business focused techniques.

Every service, but especially one directly created by government will have its shortcomings. Disability advocacy is no different. In this trial, I'm going to explain the disability process by showing you exactly what I've created to address its shortcomings. There is no better way to determine if this service is right for you than to be exposed to both its favorable and unfavorable characteristics.

## **Inside the Disability Process**

Over the years, I've discovered that case processing efficiency is the most important factor in the successful operation of an advocacy service. With this in mind, virtually every step of my process will emphasize efficiency. Never fear!

To make this easier on the student, I've created a software platform (Olivia Prime) that automates many of the steps presented within my course.

To explain my unique case processing system, let's use a common disability

scenario.

An individual becomes seriously ill or injured and is thinking about applying for SSA disability benefits. The applicant contacts your service by phone in response to your ad. In your ad, you offer to assess the client's chances of winning benefits at no charge. We'll discuss the importance of this approach in the Marketing Modules six and seven.

You might be wondering why the client would call you rather than an attorney. In the full version of this course, I'll explain why attorneys have never been able to acquire more than 10% of the disability market. Non-attorney advocates have an extreme advantage over attorneys in this field and it's their own fault!

## First Customer Contact

First customer contact, also known as the initial interview, enables you to gather client specific information relevant to the case. There are several ways to collect data from clients. In this case, we are having a phone conversation with the customer. Here is a short list of the most important client case information you must acquire:

1. Client's contact data
2. Case type, level and client location
3. Onset of disability
4. Primary diagnosis
5. Client's work status
6. Client's treatment sources
7. Does client already have a representative
8. Case viability

Now you need a place to input and store the client's data.

There are a lot operational considerations when representing a disability claim.

For example, HIPAA regulation requires that you keep all of a client's data, especially medical evidence, in a secure system meeting its standards. I provide this secure case management system in the form of my Olivia software.

Within the Olivia Prime software, I've made data entry easy by providing a client intake or interview page. See snapshot below. You access this page by clicking on the (Add New Client) button from the Olivia dashboard.

The above action takes you to the intake/Interview Client segment. You can input everything you need to know about the client or you can return later to update the client's record. The client's data is used throughout the Olivia system

allowing for a single input data solution.

## Snapshot of Olivia Intake Page

### **Case Viability Determination**

If the customer's basic information does not immediately rule him out as a client, you must determine case viability. Case viability is the approximate percent chance of winning the case. Determining case viability is extremely important to the survival of your advocacy service. If you're an employed advocate, you won't be for long if you lose most of your cases. Remember, in this business you are only paid for cases you win!

During the first client interview, you can extract most of the information you need to determine case viability. The higher the percent viability, the better your chance of winning the case.

Over the years, I've discovered that determining case viability was one of the greatest weaknesses of a new advocate. Again, getting this single assessment step wrong can literally destroy your business.

With the fate of an entire case resting on choosing viable cases, I decided not to leave an issue of this importance to chance. In response, I created the Case Assessor tool located within your Olivia Prime account. This tool can be found on the dashboard of your Olivia trial.

My assessment tool is a series of algorithms whose answers will determine the strength of the case. The hard part is interpreting the results of those answers. It can take years for a new advocate to develop the skill required to pick really solid cases.

**My Solution:** The auto-case assessor. Within your Olivia software is a tool called the Case Assessor. This tool will enable you to perform a full case assessment within 10 minutes. The system automatically determines the approximate percent chance of winning any disability case regardless of case type.

## Case Assessor Tool

## Client Intake Phase

Once you've decided to accept a case, there are a series of actions you must take. These actions involve the gathering and sending of SSA forms and other materials to your new client for completion and/or signature. SSA forms will enable you to collect detailed information needed in the evaluation of the case.

Speaking of SSA forms! With the advent of the SSA online disability system, forms are less of a headache than in the past. However, not all clients will apply online. The two biggest problems with non-digital forms are manual completion and getting the client to complete the form properly. By properly, I mean by not writing something in the form that sabotages the entire case. What is written in a client's SSA forms can make or ruin your case.

To reduce the problem with paper forms, I've incorporated a tool within Olivia called the Forms Advisor. This tool will enable you to generate and complete forms from within your Olivia software. You can also send forms to clients who use a control panel. Clients using an assigned control panel can complete their forms online. Within the online forms we have added built-in verbal instructions for the client. Imagine how much time you'll save not having to explain to a client how to complete his form.

Ok, back to Intake!

The first part of case intake involves the collection and exchange of client data. Case intake can be accomplished in several ways including the use of good old snail mail. While there may be some traditional mailing involved, more and more of this process is performed online.

To make the intake process easier for the advocate, we developed an optional intake system within the Olivia Prime software. This intake system is part of the case assessor tool. Once an assessment has been done, you'll find yourself on the assessment score page.

### Case Assessor Score page

Within the assessor score page we have built several powerful intake tools to improve the process. These customer intake tools are called:

Reports and Letters  
Information Packet (I-Pak)  
Guidance Packet (G-Pak)

The reports and letters segment enables you to generate reports and letters associated with the assessment. This tool also lets you generate client acceptance, rejection and guidance letters to your clients.

### Assessment Reports

The reports segment also enables you to create assessment reports. Assessment reports are used to attract new customers and for offering assessment services to others in this field. I'll discuss these uses in detail in the full course.

You can send these letters or group of files to customers whose cases are not yet ready for representation. Why? This approach enables you to begin forming a relationship with the client. When the client's condition worsens, you'll be the first person he call for help.

### Intake Part 2 – Becoming the Authorized Representative

In order to legally represent a client and accept a fee, you must become that client's authorized representative. In the first part of the intake process, you prepared and sent the client a series of forms to complete, sign and return to you. One of those forms is the 1696 Authorization to Represent Form.

The 1696 form when signed by you and the client and submitted to SSA, will result in your becoming the client's authorized representative under the law. This is also your opportunity to request documentation from SSA, inform SSA of existing documentation and ignite the client's case within SSA. These actions while part of the intake phase are also the beginning of the documentation phase of the disability process.

## Documentation Phase

In order for the Social Security Administration to properly evaluate a disability claim, it must acquire copies of the applicant's medical and vocational evidence covering the period of disability. As the client's advocate, you must also acquire a copy of this same evidence.

The client's records are used by the advocate to find evidence supporting his/her claim of disability. SSA uses the same evidence to determine if the client meets its criteria for a total disability. When opinions don't match in SSA disability, the winner is the one with the strongest argument!

SSA will argue that the client is not disabled and it will use the client's evidence to prove their conclusion. As the client's advocate, you must use the same

evidence to counter and reverse SSA's conclusion. Sounds like an impossible task doesn't it? In fact with my approach, it's a lot easier than you think!

To bring greater ease and efficiency to the documentation process, we developed a full documentation control system within our Olivia software. Olivia enables you to upload documents of virtually any type and view them within the system. You can scan in documents or digitally download them from SSA's Electronic Exchange, files or CD.

### Document download page

We also added a letters segment to your Olivia software. This segment enables you to create your own custom letters and distribute them from the software.

### Letters Tool

I also added a client control panel system for exchanging documents with clients?

### Client Control Panel System

The client control panel system lets you assign the client a secure online control panel from within your Olivia account. The control panel enables you and the client to securely communicate and exchange documents. To use a control panel, all the client needs is an email address and internet access.

As the client's representative, you have the right under law to request and expect to receive a copy of the client's evidence from SSA. Once you have received a copy of the client's medical and vocational evidence, you can begin the vocational analysis phase of case processing.

## **Vocational Analysis Phase**

When an individual applies for total SSA disability benefits, Social Security looks at a number of important criteria. One of those criteria is called vocational analysis. Vocational analysis is the process of evaluating an applicant's ability to



perform work with consideration of any limitations caused by the impairment.

Vocational analysis begins by evaluating the client's past work history. SSA will usually consider work performed by the client over a fifteen year period. SSA will review the exact requirements of the applicant's past work to determine if he/she can return to that work.

If the client is determined to be incapable of returning to past work by SSA, SSA will then try to determine if the client can perform other less demanding work. SSA uses reference materials like ONet or the DOT to make this determination. If SSA believes that the claimant can perform other less demanding work, the case will be denied.

While vocational analysis is challenging, it can be defeated. I'm going to show you how! In my Ultimate course, you'll be taught standard vocational analysis. Then I'll show you a unique way to avoid most of the tedious work involved in vocational analysis and still win the case.

Creating a vocational analysis report takes about four to six hours of work when you are good at it. A lot more time if you are not! But don't despair! I'm going to show you a few little known secrets that will enable you to quickly perform flawless vocational analysis in minutes. My approach reduces your vocational workload while maintaining a high win rate.

Within my Olivia prime software, I have also created an automated vocational analysis report system. The system will enable you to input specific information about a client's work history and generate a vocational report with the click of a button.

### Vocational Report Generator

Vocational reports are generally used for internal purposes, but can also be used to generate additional income for an advocacy service. There are some fabulous secrets to effectively using vocational analysis in a disability claim and I'm going to show you every one of those secrets in my course!

## Medical Evaluation Phase

An advocate must acquire a copy of the applicant's medical evidence for the period of alleged disability. This evidence enables the advocate to establish the onset, severity, limitations and duration of the applicant's impairment. All of this

data is needed in order to develop an argument for total disability.

To properly evaluate medical evidence, you must understand it. The best way to understand medical evidence is by becoming a medical professional. For years, the need to understand medical evidence was a serious barrier to many professionals wanting to enter this field. But not anymore!

To address this medical evidence barrier, I created a process called Key-Point Extraction or KPE. I entered commercial disability advocacy directly from Social Security. However, part of my educational background was as a primary healthcare Physician Assistant. This medical education gave me exact the knowledge and insights I needed to create this very effective process.

KPE enables a non-medical person to understand and extract key evidence from an applicant's medical records. Key evidence is used by the advocate to create an argument for disability on behalf of the client. Creating a sound argument for disability on behalf of your client is the primary duty of a disability advocate! My exclusive KPE course can be found in module 2 of your Ultimate training course.

## **Argument Creation Phase**

After reviewing your client's medical and vocational documentation, you're ready to begin creating the case argument. Creating an argument or memorandum is easy if you understand what SSA is looking for. But how do I know what SSA is looking for in an argument?

My bureaucratic answer: I was on the committee that wrote the standards for presenting a case argument before SSA. If you understand the criteria I helped to create, you can incorporate them into your argument to create a winning case virtually every time.

By knowing exactly what SSA is looking for in a case, it becomes almost second nature to provide the correct kinds of information.

The correct kinds of medical and vocational evidence within an argument have certain key characteristics. Some of these are:

- 1) Originate from a SSA acceptable medical source
- 2) Provides a documented diagnosis
- 3) Provides documented signs and symptoms
- 4) Causes severe physical or mental limitations

- 5) Causes severe pain
- 6) Causes severe physical disfigurement
- 7) Has lasted or is expected to last 12months

In the Ultimate course, I'll show you how to create case arguments that win. But what about efficiency? It can take hours of work to create a sound argument on behalf of your client. And, if done wrong, you could actually diminish the client's chances of receiving benefits.

The quality of a disability argument is too important to the outcome of a case to leave to chance. That's why I created the MW Composer. The MW Composer is located within your Olivia Prime software.

### MW Composer Argument Creation System

The MW Composer is the predecessor of our old Advocate Office Suite software created in 2005. This new Olivia cloud-based MW Composer enables you to easily construct arguments in a disability claim. The tool enables you to:

- A) Pick Freestyle or Template Argument
- B) Reference evidence and paste to argument
- C) Add your business header
- D) Add exhibits
- E) Edit argument in Olivia
- F) Add addendums
- G) View argument in browser
- H) Post arguments from other sources and edit.

The MW Composer is designed to save you time and effort when creating client arguments.

## Case Decision Phase

After creating and submitting your argument to SSA, you're ready to begin the decision phase of the case. In this phase, there is little to do but wait for the decision. I do recommend an SSA follow-up contact schedule, but otherwise this phase is pretty quiet. This phase is the same regardless of case level or type. The decision will either be an allowance or a denial. If the decision is a denial, you move to the next appeal level. If the decision is an allowance, you move to the billing phase.

## Billing/Paid Phase

Those of you with experience in this field recognize that billing begins at the beginning of the case, not at the end. Each advocate is responsible for keeping track of all activities associated with the representation of a case. This means that the advocate is tracking his case activity from day one.

To make the advocate case activity tracking and billing process easier, I've created a calendar based billing system within your Olivia Prime software.

### The Client Calendar

This calendar is specific to each client. You use it to input billable activities past, present or future using the Add/Modify button opening the Add/Modify page.

### Client Calendar Activity Input Page

Here is where you input the details about the activity. Some of the areas on this page may not be ready for completion. You can always return to this task later to complete the segment for final billing.

Each time you enter a task into the Add/Modify Task segment and choose Billable, Olivia automatically adds the task to your Fee Petition Attachment.

What is a fee petition attachment?

At the end of each successful case, the advocate will bill the client and send a copy of the SSA fee petition form with attachment to SSA. This gives SSA the opportunity to authorize your fee. This approach is called the fee petition billing process and is the most commonly used by advocates.

The fee petition attachment is a list of dates, times and activities performed on behalf of the client. The fee petition essentially proves the work you've performed on behalf of the client. Creating a fee petition the old manual way can take hours. Our Olivia calendar approach lets you build the fee petition attachment as you progress through the case.

### **Tracking Advocate Task**

As part of your duties as the client's representative, you'll send out forms and letters to the client, medical sources and SSA. You'll also ask SSA to send you copies of any current or future evidence that may be acquired or generated during the case. If these actions are performed on a single client, no problem. If these actions are performed for hundreds of clients, you'll need a task alert system.

Industry Secret!

The most difficult task of a disability advocacy is keeping up with a client's case-flow. Case-flow is defined as all actions taken by an advocate on behalf of a client. Case-flow tracking is the act of keeping up with case actions as you process the case. Case-flow activities makes up approximately sixty percent of the total work performed by an advocate.

Many advocate case-flow actions require follow-up. If you lose control of your follow-up, you'll quickly lose control of your business. In order to prevent case-flow from becoming an issue, I emphasize it in my training program. Good case-flow practices can significantly reduce your workload and your stress! I've learned over the years to never leave anything to chance.

To make sure my students develop good case-flow practices, I've built a powerful case-flow tracking tool into your Olivia software. It's called the task alert system. The task alert system automatically notifies you when a task is due. Think of the task alert system as an automated secretary who never fails to remind you of a task. Use it to set reminder notes, follow-ups, hearing schedules, instructions, deadlines and more for each client you represent.

How it works

You input a reminder into the task alert system for some future date. On the morning of that date, Olivia will begin sending you notices of the day's due tasks. The task alert system will automatically send you an email and/or SMS text message, reminding you of the task or event. My task alert system makes it easy to keep up with current and future activities associated with case

processing.

Let's go back into the Olivia dashboard.

### Olivia Dashboard

On the Olivia dashboard page above, you'll notice the task alert link in the lower right-hand corner of the page. Clicking the task alert edit button takes you to the task alert page below.

### Olivia Dashboard

The Task Alert system enables an advocate to schedule all activities associated with a case. The system alerts the advocate on the morning the task is due. You have complete control over when you actually receive the alert.

### Upper portion of Task Alert Page

The upper portion of the Task Alert system can be programmed to alert the advocate of a particular task. If the task occurs within seven days it will be shown on the right-hand side of the page under all task. If the task is more than seven days in the future, that task is viewed by clicking the view future task button.

### Lower portion of Task Alert Page

In the lower left-hand portion of the task alert system, you'll note an area that enables you to set the method of advocate alert. An advocate can be alerted by smart-phone, by email or by both. Having a built-in reminder system like our task alert system can significantly improve the performance of your advocacy service.

There are literally dozens of additional efficiency tools built within our Olivia Prime software that I have not been able to address in this trial. Olivia is a highly adaptive program that enables you to adjust the software to the way you practice.

We also have an open build policy for all Olivia users. If you want us to add a feature to Olivia, let us know your idea. If it also works for our other Olivia users, we'll build and provide the feature to you forever free, as a "thank you" gift for your contribution.

In this trial, I've taken you through the basic steps in disability case processing. This trial is intended to give you a realistic view of the Social Security disability process as viewed by an advocate. By pointing out the shortcomings of disability advocacy and my unique solutions, I hope this presentation makes it easier for you to choose my course. But just in case, before ending this trial, I'd like to talk just a bit more about my unique training course.

## Ultimate Course Contents

My new Ultimate advocate training program is divided into 10 modules ranging in topic from basic advocate training to alternative advocate income streams.

Students enrolled in the Ultimate course will receive all 10 of the listed modules.

### Module One – Guide to Professional Representation

- This module is an extensive ten lesson course with videos and interactive quizzes covering the basics of disability representation. Here you'll learn the fundamentals of case representation that will help prepare you for eventual SSA certification. This module will also teach you SSA rules, regulations and procedures. This module also contains the course syllabus, videos, charts and other reference materials to enhance your training experience.

**Module Two - Key-Point-Extraction (KPE)** - The lack of a medical background is no longer a barrier to entering this field. While disability advocacy does not require a medical background, it does require that you understand, review and extract key evidence from a client's medical records. Our exclusive KPE process enables you to review and extract key evidence from medical records regardless of your background.

### Module Three - Operating an Advocacy

**Service**. This module once again takes you through the entire SSA disability process. Only this time, we'll view case processing from a business perspective. Like Module One, we'll begin with case intake, ending with the

billing process. You'll learn insightful business and operational procedures that will enable you to earn more income with less work over a shorter period of time.

#### **Module Four -Vocational Analysis and Case Strategies.**

By the time you reach this module, you will have already been taught basic vocational analysis. In this segment, we go into advanced vocational analysis.

Here I'll show you the inside secrets to using VA to your client's advantage. I'm going to show you how to kick a SSA vocational specialist in the rear, and win virtually every case you represent.

**Module Five - The Formal Argument.** The ability to create a formal argument on behalf of a client is critical to your success in this field. In this module, I'll teach you the secrets to creating arguments that significantly improve your chances of winning. I'll also show you how to use my Olivia argument creation tool. This tool will enable you to create stunningly effective arguments much faster than usual and with better strategic quality.

**Module Six - Advocate Marketing Strategies.** This segment will show you a multitude of marketing approaches for building an advocacy service from the ground up. Module six also includes a complete marketing system designed specifically for disability advocates. It's called the MTD Sponsorship Program. As you might suspect, this marketing tool is located inside of your Olivia software. You'll learn more about this tool in the full version of the course.

**Module Seven - IT Marketing.** Before creating your Internet marketing strategy, there are a few ecommerce considerations you need to know. In this module you'll learn how to use basic e-commerce to market your service using Mobile and Internet friendly techniques.

**Module Eight - Advanced Topics.** This module contains advanced topics in business, medicine, marketing, operations and special topics for advocate career development.



## **Module Nine -Advocate Business Resource**

**Center.** This module contains business focused information associated with creating a start-up and/or expanding an existing service. We also provide valuable suggestions for incorporating disability advocacy into an existing business.

## **Module Ten - Alternative Income Streams.**

This exclusive segment will show you several little known methods of extracting additional income from your advocacy service. Several of these processes with billing capability are already built into your Olivia software.

## **Advocate Support**

Support is perhaps the most important component within your training package. With our mentor-based support service, you will be assigned a mentor for one full year. Your mentor is there to provide you with one-on-one support in every aspect of your education from picking a name to the final billing of a client. Our Ultimate advocate training program can be purchased with or without mentor support. All packages come with training and the purchased level of software and support.



Start the full version of your advocate training today! If you have questions prior to ordering,  
please call 303-766-1111. [www.ssahelp.com](http://www.ssahelp.com).