

Pick one number to know by next Friday.

Your firm already holds four sources of data. Each starter below uses one of them, needs no vendor and gives you a number you can check and use before you build the full forecast.

1

Chart your open cases by age

YOU NEED

Your status-report exports: initial/recon and hearing.

DO THIS

1. Save each export with its date. Don't overwrite last month's.
2. Add an age column: today minus the date the case entered its current stage. Use the stage date, not the export date.
3. Count cases in 30-day buckets, one chart per stage.

YOU LEARN

Where your backlog sits, and which cases are older than SSA's published average for their stage.

2

Look up your hearing offices' waits

YOU NEED

SSA's hearing office report. It's free and updated monthly: ssa.gov/appeals/DataSets (NetStat report).

DO THIS

1. List the hearing offices your cases sit in, by office code.
2. Note each office's average months, request to hearing held, and the report month.
3. Add those months to each pending request date.

YOU LEARN

Roughly when today's hearing requests come due. It's an average for closed cases, not a date for one case.

3

Work out your realized average fee

YOU NEED

The AARPS fee payment history (it exports to Excel) and your list of favorable decisions.

DO THIS

1. Pick favorable decisions old enough for the fee to have arrived.
2. Total every payment for each of those cases.
3. Divide by the number of favorable cases, counting the ones that paid \$0. Do it by stage.

YOU LEARN

What a win is actually worth at each stage. The forecast needs this number.

The four sources, and which question each answers

SOURCE	ANSWERS	WHERE IT IS
SR Status reports	Where is every case right now? Stage, status dates, hearings, CE appointments, office.	SSA representative status reports: separate initial/recon, hearing and appeals reports. One row per case.
EF The eFolder	Why did it happen? Determination explanations, SSA-831 transmittals, ALJ decisions.	Each claimant's electronic folder. The 831 body-system code makes impairment sortable.
AA AARPS	What is coming in, and what did we collect? 1696 acceptances, fee payments.	The case appears when your appointment is accepted, before DDS. Payment history exports to Excel.
SSA SSA public files	How long will SSA take? National initial/recon averages, hearing office waits.	ssa.gov/ssa-performance and the monthly hearing office (NetStat) report.

Before you upload anything

- ✓ Your own data only.
- ✓ Strip names, SSNs, birth dates; use a case ID.
- ✓ Practice management, not case strategy.
- ✓ Firm-approved tools only.
- ✓ A person checks inputs and results.
- ✓ Forecasts describe caseloads, not claimants.

46 questions your own data can answer

★ on the slide · Source that answers it: [SR](#) status reports [EF](#) eFolder [AA](#) AARPS [SSA](#) SSA public files

About the judge

- 1 ★ What does this ALJ actually award, and on how many of our cases? [EF](#)
- 2 How often does this ALJ issue a partially favorable decision with an amended onset date? [EF](#)
- 3 Does our win rate before this judge beat the judge's published rate? [EF](#) [SSA](#)
- 4 Is this judge's rate stable year to year, or did it move? [SSA](#)
- 5 Which judges send our cases to a supplemental hearing most often? [SR](#)
- 6 When a medical or vocational expert is scheduled, does our outcome change? [SR](#) [EF](#)

About my own cases

- 7 ★ Which impairments do we win, and which do we lose? [EF](#)
- 8 At which step of the sequential evaluation are our cases denied? [EF](#)
- 9 How often does the RFC the judge found match the RFC we argued? [EF](#)
- 10 Does our win rate by impairment change with the claimant's age band? [EF](#)
- 11 Is this year's win rate better than last year's, with the same judges? [EF](#)
- 12 Which hearing offices do we win most at, and least? [SR](#) [EF](#)
- 13 How many of our initial denials are non-medical? [EF](#)

About the clock

- 14 ★ Which heard cases are overdue for a decision? [SR](#)
- 15 How long do our cases take at each stage, against SSA's published average? [SR](#) [SSA](#)
- 16 How many days pass between a denial and our appeal filing? [SR](#)
- 17 How close to the appeal deadline do we usually file? [SR](#)
- 18 Is our hearing office faster or slower than six months ago? [SSA](#)
- 19 Which cases are past the published average for their stage? [SR](#) [SSA](#)

About evidence

- 20 Which providers are slowest to answer evidence requests, at the slow end, not the average? [SR](#)
- 21 Which evidence requests are still outstanding, and how old are they? [SR](#)
- 22 Which upcoming hearings have records more than six months old in the file? [SR](#) [EF](#)
- 23 Which claimant information requests are still open? [SR](#)

About case movement

- 24 ★ Which cases have stayed at the same stage longest? [SR](#)
- 25 How many cases changed stage this month, and in which direction? [SR](#)
- 26 When does our current recon inventory reach the hearing level? [SR](#) [SSA](#)
- 27 How many CE appointments are on the calendar in the next 30 days? [SR](#)
- 28 Which status changes never made it into our own system? [SR](#)
- 29 Which offices are our cases piling up in? [SR](#)

About the money

- 30 ★ How many hearings land in the next 30, 60 and 90 days? [SR](#) [SSA](#)
- 31 What is our realized average fee per favorable decision, counting the \$0 ones? [AA](#)
- 32 How long from a favorable decision to the fee payment, by stage? [AA](#)
- 33 Which favorable decisions still show no fee payment? [AA](#) [SR](#)
- 34 What share of our fees comes from initial and recon awards rather than hearings? [AA](#)
- 35 How much fee cash should arrive each month for the next six months? [AA](#) [SR](#) [SSA](#)
- 36 How many new 1696 acceptances arrived this quarter, against last year? [AA](#)

About what we believe

- 37 ★ Which of our rules of thumb survive our own closed cases? [EF](#)
- 38 "Late CEs hurt us." Do they, with the judge held constant? [SR](#) [EF](#)
- 39 "That office is slow." Is it, against the published wait? [SSA](#)
- 40 "Younger claimants are hard to win." For every impairment, or only some? [EF](#)
- 41 "Recon is a rubber stamp." What is our actual recon award rate? [SR](#) [EF](#)
- 42 "Treating-source statements win cases." Do they, for our cases? [EF](#)

About the data itself

- 43 Does every open case in our system appear in SSA's status reports? [SR](#)
- 44 Which cases appear in SSA's reports but not in our system? [SR](#)
- 45 How current is each representative's export? [SR](#)
- 46 Which fields are blank most often in our exports? [SR](#)

Build the forecast in five steps

1. Where is each case now?
2. How long does each leg take?
3. How old is each case today?
4. Which cases continue, and which win?
5. What cash and staffing follow?

Six rules

1. Use each case's own dates.
2. Add expected amounts, then round.
3. Keep overdue cases visible.
4. Match the benchmark to the office and stage.
5. Show assumptions, and test faster and slower timing.
6. Back-test against what actually happened.



Get the full prompt
plus the workbook
and sample files