



BRIGHTLY EVIDENCE AUDIT

Brightly Report

Anonymized sample of the full-case evidence report. 24 consolidated findings.

Brightly Record	DEMO-BY-2026-0042	Claimant	Avery Example
Representative	Morgan Sample	Firm	Example Practice
Claim	Title II / DIB	Report Date	Sample release
Record Examined	SSA ERE - 1,680 pages	SSA case file #	SSA-SAMPLE-0042

Selected findings

1,680 pages organized into 24 consolidated findings and their source trails.

7 Supported | 3 Contradicted | 14 Unknown

Denial basis changed at reconsideration

Page 21

Initial: not severe. Reconsideration: capacity for other work.
Sources: Volume A pp18, 37; pp9, 23, 27.

Post-onset work entries conflict

Page 12

Initial review records work after onset; reconsideration marks none.
Sources: Volume A pp2, 9, 12, 176.

Requested records arrived after the initial decision

Page 12

The later return is present; earlier receipt is not established.
Sources: Volume B pp206-212; Volume A pp3, 13, 34, 37, 345.

A response to the work-development request is not established

Page 25

The request is recorded; the field-office response is unavailable.
Source: Volume A p12; field-office action history not supplied.

Record sources are cited above. Report-page links open the supporting analysis.



1. Brightly Report

At a glance

AUTHORIZED RECORD	RESPONSIBILITIES	SUPPORTED	CONTRADICTED	UNKNOWN
1,680 pages	24	7	3	14

24 consolidated responsibility-level findings. Detailed source comparisons and unresolved factual relationships appear in the Evidence Map. This is a case-wide report, not a list of selected intake questions.

Contradicted

SSR used to support the vocational finding - When selecting an SSR in lieu of occupations to support a framework step-five denial, cite a ruling whose content directly addresses the entire occupational-base erosion implicated by the recorded RFC and explain why it does not significantly erode that base.

Reconsideration notice - remaining work capacity - For a personalized reconsideration explanation based on capacity to do other work, describe in general terms the lesser work demands the claimant can meet, including relevant mental capacities.

Reconsideration notice - changed basis - When the reconsideration denial basis changes, acknowledge the reason given at the initial level before stating the reconsideration reason in the personalized explanation.

Supported

Initial psychiatric-review documentation - Complete and consultant-sign the initial psychiatric-review standard document, recording MDIs, pertinent findings, four functional ratings and listing criteria.

Reconsideration psychiatric-review documentation - Complete and consultant-sign the reconsideration psychiatric-review standard document with four functional ratings and relevant criteria.

Opportunity to submit additional evidence - Give claimant an opportunity to present additional evidence through case-review reconsideration.

Independent reconsideration reviewers - Use a different disability examiner, medical consultant, and psychological consultant from initial determination.

Initial notice content - Include in written initial notice clear determination, reasons and effect, understandable evidence statement, and right to reconsideration.

Reconsideration notice and hearing rights - State reconsidered determination and right to hearing in written notice.

DDS recognition of post-onset work - Recognize reported post-onset work and unresolved work-development issue appearing in claim evidence.

Unknown

Step-five vocational support - Support framework step-five finding by three occupations in significant numbers or an SSR directly addressing entire RFC occupational-base erosion; test rare exceptions.

Initial mental-function evaluation - Rate mental function longitudinally and document severity, including episodic limitations and setting/treatment context.

Initial medical-record development - Develop complete medical history and make timely initial/follow-up requests when evidence absent.

Reconsideration work-activity record - Consider work activity and accurate technical work record under applicable SGA/step one rules.

Initial notice delivery - Dispatch the written determination notice to the required party at the last known address; content is separately tested in exact content duties.

Reconsideration review of the evidence - Opportunity to present additional evidence and review initial plus new evidence under preponderance standard.

Reconsideration notice delivery - Dispatch the written determination notice to the required party at the last known address; content is separately tested in exact content duties.



2. Responsibilities & Conclusions

01 Step-five vocational support

Unknown

Responsibility: Support framework step-five finding by three occupations in significant numbers or an SSR directly addressing entire RFC occupational-base erosion; test rare exceptions.

SSA action: reconsideration 2026-09-07

Historically applicable source(s): 20 CFR 404.1512(b)(3), 404.1560(c)(2), 404.1520(h); POMS DI 25005.005D.2.d rev 2022-12-08; POMS DI 25025.030B rev 2024-01-02; SSR 24-3p effective 2025-01-06, conditional VE/VS route

Evidence conclusion: DON'T KNOW — because the authoritative record may contain a separate occupation or ruling analysis outside the supplied PDFs

02 Initial mental-function evaluation

Unknown

Responsibility: Rate mental function longitudinally and document severity, including episodic limitations and setting/treatment context.

SSA action: initial 2025-10-08

Historically applicable source(s): 20 CFR 404.1520a(c),(e), 404.1529(c); SSR 16-3p effective 2016-03-28; POMS DI 24501.016 rev 2024-02-07; POMS DI 24501.021 rev 2024-09-19; POMS DI 26515.001 rev 2017-03-24

Evidence conclusion: DON'T KNOW — because the scope and material effect of contradictory symptom statements and the exact fax-to-receipt linkage remain unresolved

03 Initial medical-record development

Unknown

Responsibility: Develop complete medical history and make timely initial/follow-up requests when evidence absent.

SSA action: initial 2025-10-08

Historically applicable source(s): 20 CFR 404.1512(b)(1); POMS DI 22505.035 rev 2024-04-15

Evidence conclusion: DON'T KNOW — because the September original-request dispatch date is missing, and the March 27 Meadowbrook Clinic later-period request's transmission, follow-up, and permissible closeout before the October 8 determination cannot be verified.

04 Reconsideration work-activity record

Unknown

Responsibility: Consider work activity and accurate technical work record under applicable SGA/step one rules.

SSA action: reconsideration 2026-09-07

Historically applicable source(s): POMS DI 24001.005A-C rev 2024-06-20; POMS DI 25501.200C rev 2024-07-01 (conditional onset predicates); 20 CFR 404.1520(b), 404.1571-404.1575; POMS DI 27001.010C rev 2026-01-22, material inconsistencies at reconsideration

Evidence conclusion: DON'T KNOW — because the field-office assistance-request disposition and correction history for conflicting work entries are unavailable

03 Initial medical-record development - Unknown

Record evidence

- ERE Volume C pp353-355 Sept 18 Meadowbrook Clinic follow-up and Nov 25 response says original request not received
- ERE Volume C pp146-152 Jul 30 2025 request and Feb 5 fax response
- ERE Volume A p13 initial DMA received list; p37 notice lists Meadowbrook Clinic unable to obtain additional reports despite multiple Feb responses
- Volume C p354 Sep 18 follow-up says original requested evidence not received and gave Sep 28 response date; p355 Nov 25 Meadowbrook Clinic response explicitly says original request never received. Volume C p147 Jan 29 request sought Mar 2 2023-present and the Feb 5 fax contains actual records; initial DDE p13 lists four Meadowbrook Clinic MER receipts.
- Volume C pp353-356 Mar 19 2025 follow-up letter asks response by September 28; November 25 provider fax says original request never received. Volume C p147 contains distinct Jul 30 2025 request Request ID SAMPLE-A for 2023-03-02 onward; Volume C pp347-348 contains Jan 29 request Request ID SAMPLE-B for 2025-03-02 onward; four Meadowbrook Clinic MER entries received Feb 5-6 in initial DDE Volume A p13. Original pre-Sep18 dispatch date is not in supplied pages.
- A distinct Sep 25 2025 Meadowbrook Clinic request in ERE Volume B pp206-212 sought records from Aug 2 2025 onward and invited response by Apr 11. The initial determination and notice are dated Oct 8 (Volume A pp12,34), before that stated reply date; its received-evidence list through Apr 6 (Volume A p13) does not include a later Meadowbrook Clinic return, and the notice p37 says additional Meadowbrook Clinic reports were unobtainable. The Meadowbrook Clinic response, covering Feb 1-Apr 29, arrived Apr 30 and appears as Initial MER in the recon evidence list (Volume A pp3,345). The request copy alone does not prove a transmitted request or a follow-up, and the adjacent Volume B p205 fax cover names Lakeside Specialty Clinic, so do not attribute that cover to Well Life. The 10-day follow-up response rule in DI 22505.035B.2 applies to a follow-up, not automatically to this apparent new period request. Exact March request transmission, whether and when a follow-up was due/sent, any alternate receipt, and a permissible documented reason to decide on Oct 8 require the DCPS/CDW development history. The later Apr 30 record confirms evidence existed, not that DDS possessed it on Oct 8. This converts the former generic additional-report gap into a dated, source-specific timing question; no duty answer is released.

Contrary / alternative evidence

- Multiple requests and responses could satisfy effort; Sept initial request date/dispatch and repository coverage needed
- No omission-based NO from no original fax in partial packet
- Under DI 22505.035B.2, follow-up is 10–20 calendar days after initial request and source gets at least 10 days; the Sep 18 request meets the 10-day reply period on its face, but without original dispatch date its 10–20-day timing cannot be decided. The Jan/Feb request-response path establishes later development, not earlier timing.
- March 27 source-specific request and Apr 11 reply invitation; no inference of breach from later Apr 30 response alone without transmission, follow-up, and permissible cessation audit.

Governing sources

- 20 CFR 404.1512(b)(1)
- POMS DI 22505.035 rev 2024-04-15

04 Reconsideration work-activity record - Unknown

Record evidence

- ERE Volume A p2 recon DDE says no post-onset work
- ERE Volume C p299 Oct 9 2024 employed; p313 Nov 1 resignation; p220 Nov 26 new job; p187 Dec 24 active at work; p430 July 2024 Position B
- ERE Volume A p12 initial DDE affirmatively answers Yes to work after AOD, with work activity report/SGA determination absent and AR sent 2025-09-16
- ERE Volume A p2 recon DDE answers No to the same after-AOD work question
- ERE Volume A p176 original disability report identifies Nov-Dec 2023 Service Position A after asserted Sep 2023 onset
- Recon DDE Volume A p9 itself lists Service Position A November–December 2023, after its p2 AOD 2024-03-30, while p2 marks no post-AOD work; original Volume A p176 SSA-3368 independently lists the same dates.
- Work chronology refined: initial DDE Volume A p12 states AR sent Sep 16 2025; initial determination October 8 is 22 days later. Historical DI 10005.010B.2 measures 14 days from the request, not from FO receipt; the Sep 16 2025 sent date would yield September 30, 2025 if it was an actual actionable request. The DDE note does not supply the AR transaction, delivery/control log, FO status or response, so compliance remains unresolved. A status report with expected completion date could satisfy the 14-day action without final SSA-823 completion. Recon Volume A p2 has distinct questions: no work since last disability report and no work after Mar 30 2024 AOD. The latter conflicts on its face with recon p9 and original SSA-3368 p176 November–December 2023 Service Position A; listed the reported work schedule, the reported hourly rate is self-report, not verified monthly



- POMS DI 27025.020C.5.b, Rev 2022-03-09
- POMS DI 27025.025, Rev 2010-05-06
- 20 CFR 404.922, redesignated 1986-01-03

20 Reconsideration notice - changed basis - Contradicted

Record evidence

- Initial DDE Volume A p18 medical disposition Not Severe; initial personalized explanation p37 says no significant limits in basic work activities.
- Reconsideration DDE Volume A p9 uses J1 Capacity for Other Work, 20 CFR 404.1520(g); personalized explanation p23 and duplicate p27 says some limitations, insufficient past-work information, can adjust to other work.
- The recon cover p21 says prior determination was proper under law; explanation pp23/27 does not state the original no-significant-basic-work-limits reason or otherwise distinguish it from new other-work basis.

Contrary / alternative evidence

- Recon wording "not severe enough to keep you from working" is a generic inability-to-work formulation, following "some limitations"; it does not identify the initial reason of no significant basic-work limits.
- The cover's assertion that the prior determination was proper identifies no reason. Duplicate recon notice pp25-27 has identical content.
- This is an exact content duty; no claim is made about mailing, benefit qualification, or whether the reconsideration medical/vocational finding is substantively correct.

Governing sources

- POMS DI 27025.020B.3, Rev 2022-03-09

21 DDS recognition of post-onset work - Supported

Record evidence

- Volume A p12 initial DDE affirmatively marks work after AOD Yes, work report/SGA determination absent, and records AR sent 2025-09-16
- Volume A p176 initial SSA-3368 lists November–December 2023 Service Position A after September 2023 AOD

Contrary / alternative evidence

- Narrow recognition does not establish actual FO receipt, SSA-821/823 development, work-level SGA finding, or correct recon field.

Governing sources

- POMS DI 24001.005A, Rev 2024-06-20

22 Field-office development of post-onset work - Unknown

Record evidence

- Volume A p176 original SSA-3368 lists Nov-Dec 2023 post-AOD Service Position A job; Volume A p12 initial DDE Apr 2025 says post-AOD work Yes and Work Activity Report/SGA Determination in file No.
- Work chronology refined: initial DDE Volume A p12 states AR sent Sep 16 2025; initial determination October 8 is 22 days later. Historical DI 10005.010B.2 measures 14 days from the request, not from FO receipt; the Sep 16 2025 sent date would yield September 30, 2025 if it was an actual actionable request. The DDE note does not supply the AR transaction, delivery/control log, FO status or response, so compliance remains unresolved. A status report with expected completion date could satisfy the 14-day action without final SSA-823 completion. Recon Volume A p2 has distinct questions: no work since last disability report and no work after Mar 30 2024 AOD. The latter conflicts on its face with recon p9 and original SSA-3368 p176 November–December 2023 Service Position A; listed the reported work schedule, the reported hourly rate is self-report, not verified monthly earnings or SGA. Do not infer work-rule violation or SGA without FO technical record, AR log, correction history and exception analysis.

Contrary / alternative evidence

- The DDE records absence in its file; FO technical systems, eView/EP, and referral status are not certified by supplied ERE. Determine whether clearly-not-SGA exception was supported.

Governing sources

- POMS DI 24001.005B rev 2024-06-20
- POMS DI 10505.035B,G rev 2024-10-30; clearly-not-SGA exception

10 Combined-effects severity evaluation

Why the record stops here: DON'T KNOW — because the checkbox and functional narratives show a combined nonseverity conclusion, but whether the actual combined and episodic effects were sufficiently evaluated against material contrary evidence remains unresolved

What would resolve it

- Combined effects evaluated, not only separate impairment labels - Volume A pp15-18 combination No and separate narratives; DI 24505.005A
- Nonseverity clearly established by combined functional evidence - Volume A pp15-18; Volume B pp317-318; 404.1523(c), DI 24505.005A-D
- Longitudinal episodic and combined effect assessment satisfies April 2025 rule - Volume A pp14-18, Volume B pp317-318; 404.1520a(c), DI 24505.005A,D rev Mar 11 2025

11 Analysis of prior administrative medical findings

Why the record stops here: DON'T KNOW — because the supplied PDFs are not certified as covering every permissible location for the initial-consultant analysis

What would resolve it

- Written source-level analysis with supportability and consistency in recon DDE - Volume A pp2-10 read; p7 separate medical-opinion field
- No qualifying analysis in any authoritative decisional record location - 1680-page ERE PDF extraction negative; POMS DI 81001.005C says ERE is upload route and official CEF may not hold all SSA-system records; no certified export manifest supplied.
- Separate analysis or cross-reference in authoritative decisional location - DI 24503.030B.2, CEF/DCPS index absent

12 Field-office development of post-onset work

Why the record stops here: DON'T KNOW — because the FO work-development record, referral timing, and any supported clearly-not-SGA exception are unavailable

What would resolve it

- FO completed report/SGA record before DDS referral or valid clearly-not-SGA exception - Volume A p12 says no report/determination in file; FO repositories and earnings development missing
- Timing of referral relative to any FO disposition - full referral/FO technical record unavailable

13 Field-office response to the work-activity request

Why the record stops here: DON'T KNOW — because the FO action record does not establish whether it furnished timely development or a status report, or how it resolved the work request

What would resolve it

- FO received actionable AR - FO AR log unavailable
- FO supplied development or a status report within 14 days of September 16 request, with subsequent work issue disposition if applicable - DI 10005.010B.2; DI 10501.025B.4; FO EDCS action/CEF and technical record unavailable
- Conditional 14-day calendar interval from September 16 request - Sep 16 +14 calendar days = Sep 30; AR transaction/actionability and FO response not established, initial determination Oct 8.