

GUIDE 09 / PLAN YOUR SUPPORT

Consultation preparation workbook

Use a focused agenda to make a \$75 consultation practical, organized, and useful.

What you will leave with: Identify your three priorities and leave with an action list you can follow.

Use this guide with current official instructions. Complete worksheets privately; do not send sensitive information through the website.

Decide what you want the conversation to accomplish

A TFDR consultation is \$75 for up to 60 minutes. Use the time to clarify the process, identify documents to obtain, and organize your next steps. You do not need a polished application or a complete medical file to prepare an agenda. A useful starting point is one sentence: "By the end of this conversation, I want to understand..." Then choose three questions that would make the biggest practical difference.

TFDR is an independent non-attorney consulting business. A consultation does not provide legal representation, medical opinions, an eligibility decision, or an approval guarantee. You remain responsible for your application, signatures, and submission. If the main issue requires an attorney, treating clinician, tax professional, or official agency decision, identify that need early.

Make a short private snapshot

1. Note your current employment status and whether you have started an application. Use a private worksheet, not the staging website.
2. Identify your current stage: exploring options, gathering records, requesting agency forms, preparing an application, or responding to a communication.
3. List any official deadline and the document that states it. Do not estimate a deadline from memory.
4. Write the specific duties or attendance demands you have difficulty meeting, using concrete examples. Separate personal observations from provider-documented restrictions.
5. List what is already available and what remains missing. A brief inventory is usually more useful for planning than an unexplained stack of files.

Bring questions, not just a history

Less focused	More useful
What should I do?	Which three documents should I request next, and from whom?
My agency is confusing.	Who should complete the remaining agency forms, and what should I ask HR to confirm?
Are my records enough?	Which topics appear unaddressed and should be discussed with my provider?
Can you get me approved?	What can this service help organize, and which decisions remain with OPM?

Less focused	More useful
Tell me everything.	Help me understand the next stage and leave with a written personal action list.

Long histories can consume the session before the main question is reached. Put the most time-sensitive issue first. If you have many concerns, group them into process, evidence, agency communication, and service-scope questions. You can then decide which group matters most today.

Prepare documents without sending them through an unverified channel

Keep a position description, relevant agency correspondence, your document inventory, and any official notice accessible on your own device. These are preparation suggestions, not a promise that a full records review is included in a consultation. Ask about the scope of any review before purchasing a separate service. Do not assume a 60-minute meeting includes reading hundreds of pages.

On the current staging site, intake, medical uploads, payment, and electronic signatures remain disabled. Do not paste medical details into a contact field or email records to an address you have not independently verified for secure handling. This workbook can be used privately now; scheduling and delivery should follow the verified instructions available when services are enabled.

Use a fictional agenda and follow-through

Fictional worked example

Taylor has an incomplete records collection and unanswered HR questions. Taylor's agenda is: confirm the current application starting point; identify which agency forms remain pending; plan a request for missing specialist notes. Taylor keeps the relevant notice open privately. At the end, the action list assigns Taylor the records request and HR follow-up, with dates. A clinical question goes to the treating provider. No one labels the session an OPM eligibility determination.

1. At the start, state the top priority and mention any official deadline.
2. During the session, ask for plain-language clarification when a term is unfamiliar.
3. Before ending, repeat your understanding of the next actions and ask what remains unresolved.
4. Afterward, save your notes, complete the first action, and update your tracking log.

Your agenda and completion check

Your private worksheet

My main goal for this consultation:

My three questions, in priority order:

Official deadline and the source notice, if applicable:

Documents I can reference privately:

What I need from HR / a treating provider / another professional:

Action / person responsible / target date / evidence of completion:

☐ I understand the \$75, up-to-60-minute scope.

☐ My top three questions are written down.

☐ I know which facts need verification.

☐ I have not submitted sensitive information through staging.

☐ My next steps are specific enough to complete.

Official sources

OPM: SF 3112, Documentation in Support of Disability Retirement Application · OPM: FERS types of retirement - disability retirement and current application instructions

Reviewed October 14, 2026. Check current official sources before acting.

TFDR provides independent non-attorney education. These resources are not official forms, legal advice, medical opinions, or individualized tax advice. You prepare and submit your own application. OPM determines eligibility.