



# Documenting Disability: Letter Writing Guidelines

Requests for clinicians to write letters documenting medical impairments may come from patients, attorneys or case workers at the time of initial application, or may come from SSA or the State's disability determination services as it investigates an applicant's claim. The following guidelines for such letters are derived from an advocate's guide prepared by Peter H. D. McKee and from a curriculum for medical providers prepared by Paul Quick, M.D, Barry Zevin, MD, and Masa Rambo, FNP. Adapted with permission.

- ① Review the Social Security Administration's "Listing of Impairments" ([www.socialsecurity.gov/disability/professionals/bluebook/listing-impairments.htm](http://www.socialsecurity.gov/disability/professionals/bluebook/listing-impairments.htm)) for each health problem that your patient has. Note the clinical findings and symptoms of each relevant impairment delineated in the listing.
- ② Compare the clinical findings and symptoms specified in the Listing with the findings recorded in your patient's medical record by you or any other medical provider.
- ③ Write a specific letter that
  - Specifies the length of your relationship, whether you are the treating physician and gives your general past history of treatment;
  - Provides a candid observation of the severity and duration of the patient's impairments, documenting his/her relevant work history, age, height, weight, vital signs, relevant measurements, and physical examination results;
  - Gives objective evidence of the patient's impairments, one at a time, as defined by the Listing of Impairments, and compares exact findings or symptoms of the relevant listed impairment with the specific findings or symptoms of your patient;
  - Uses the recognized medical terms or measurements described in the age-appropriate Listing of Impairments. If criteria for a listed impairment are not met, specifies the patient's functional limitations secondary to all specified disorders, how long they have lasted and are expected to last, the patient's ability to do basic work activities, and any special circumstances (whether the patient fits an adverse profile);
  - Closes with a summary statement specifying what listing(s) is/are met or how equaled, given all functional limitations taken together; and
  - Is signed by an acceptable medical source with title and relevant certifications (e.g. board certified, academic credential or other special qualifications). If the letter is written by a nurse practitioner or other provider, it should be co-signed by an acceptable medical source with statement of that person's involvement.
  - If applicable, speak with the advocate or attorney handling the case before sending the letter to an agency.
- ④ Attach all relevant chart notes and progress notes to the letter.

*From: Documenting Disability: Simple Strategies for Medical Providers. An Advocate's In-Depth Guide to Social Security Disability and Medical Letter Guide, prepared by Peter H. D. McKee, JD (Douglas, Drachler & McKee, LLP, 1904 3rd Ave., Ste 1030, Seattle, WA 98101; e-mail: TUPHDM@Qwest.netUT); PowerPoint presentation by Paul Quick, MD, Tom Waddell Health Center, San Francisco Department of Public Health (3/13/03).*