

\*\*\*\*BARCODE\*\*\*\*

**AGENCY  
LETTERHEAD**

Date: \_\_\_\_\_  
Claim ID: \_\_\_\_\_

Addressee Name  
Address Line 1  
Address Line 2  
City, State, ZIP Code

Claimant: [Fill-in]  
DOB: xx/xx/xxxx

We are the office that makes the disability determinations for the Social Security Administration. **[First Name] [Last name]** is applying for or is receiving disability benefits due to the following conditions: ***[List Conditions]***

Please provide medical reports including the following information: medical history, clinical findings, laboratory findings, treatment prescribed and the response, diagnosis, and prognosis.

Please send the information requested below, covering the period of ***[Fill-in date]*** to ***[Fill-in date]***, to help us evaluate this claim.

- ***[Fill-in]*** (e.g. history, diagnosis/prognosis, most recent mental status exam, etc.)
- ***[Fill-in]***

We are enclosing a signed, HIPAA compliant authorization (SSA-827) for release of medical records and information.

***[Optional canned text for claims involving mental impairments]***

Please provide a statement based on your findings. Your statement should express your opinion about your patient's ability to do work-related mental activities *despite the limitations imposed by his/her mental condition(s)*. These activities include: understanding, carrying out and remembering instructions, and responding appropriately to supervision, coworkers, and work pressures.

***[Optional canned text for claims involving physical impairments]***

Please provide a statement based on your findings. Your statement should express your opinion about your patient's ability to do work-related physical activities *despite the limitations imposed by his/her medical condition(s)*. These activities include sitting, standing, walking, lifting, carrying, handling objects, hearing, speaking, and traveling.

**[Optional canned text for a claim for a child]**

Please provide a statement based on your findings. Your statement should express your opinion about your patient's abilities and limitations compared with children of the same age without medical conditions. Consider areas such as, but not limited to, age-appropriate learning, attention, interaction with other people, motor functioning, and behavior and self-care. Please also comment on how this child's medical condition(s) and associated treatments, including the frequency of treatment, affect his or her overall functioning.

Submitting Records: Refer to the instructions on the bar-coded cover page.

Payment Information: We will pay you for your report and records. See the attached invoice for instructions. To receive payment, you must complete the attached invoice and submit it with the requested records and statements within **[Fill-in#]** days of the date of this letter.

**[Optional canned text]**

We do not pay any State or Federal facility. If you are in such a facility, you will not find a voucher in this request.

For billing questions or inquiries please call x-xxx-xxx-xxxx.

Other Information: Please indicate if you would be willing to conduct an examination, test, or both at our expense if we later determine that we need more medical information. If you do not respond, we will assume that you do not wish to conduct such an examination of this patient.

\_\_\_\_\_ Yes, I am interested.

\_\_\_\_\_ No, I am not interested.

If you have any other questions please contact **[Mr./Ms.] [Disability Examiner's name]** at xxx-xxx-xxxx.

If you have no records for this patient please check here \_\_\_\_\_

CLAIMANT:  
DDS CASE NUMBER:  
DEA: ATE000

### DIABETES QUESTIONNAIRE FOR TREATING SOURCE

1. Please include treatment notes, and lab tests from \_\_\_\_\_ to \_\_\_\_\_
2. Diagnosis \_\_\_\_\_
3. Date of onset of symptoms. \_\_\_\_\_
4. Height \_\_\_\_\_ Weight \_\_\_\_\_ Date \_\_\_\_\_
5. Date and results of the latest blood sugar evaluation and glycohemoglobin (HbA1C).  
\_\_\_\_\_
6. If acidosis has occurred on the average of at least once every two months, please indicate blood chemical test (PH or PCO2 or bicarbonate levels) and the dates performed. \_\_\_\_\_  
\_\_\_\_\_
7. If the patient has sustained an amputation due to diabetic necrosis or peripheral vascular disease, please describe and indicate the date of the amputation.  
\_\_\_\_\_  
\_\_\_\_\_
8. If present, please describe any visual abnormalities due to diabetes. \_\_\_\_\_  
\_\_\_\_\_
9. Is there any evidence of neuropathy? If so, please describe. Is an assistive device medically required for ambulation? When was it prescribed? \_\_\_\_\_  
\_\_\_\_\_
10. Is the Diabetes under satisfactory control?  Yes  No
11. Please describe compliance and response to treatment. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. Please indicate any other observable conditions or pertinent clinical findings that might affect the patient's functional abilities. \_\_\_\_\_
13. Date first seen: \_\_\_\_\_ Date last seen: \_\_\_\_\_ Frequency of visits: \_\_\_\_\_

Thank you for your cooperation.

Physicians Signature \_\_\_\_\_ Print or type name \_\_\_\_\_  
Date \_\_\_\_\_  
Phone Number \_\_\_\_\_ Best time to call \_\_\_\_\_

CLAIMANT:  
DDS CASE NUMBER:  
DEA: ATE000

**Treating Physician  
General Medical Evaluation**

**Directions:** Please provide a current assessment using objective findings. This information is necessary to evaluate this patient's disability claim. **Please indicate if normal. If abnormal, please list specific findings.** (Please use reverse side if additional space is needed.)

**Date of Exam:** \_\_\_\_\_ **Frequency of Visits:** \_\_\_\_\_

**General Appearance**

1. Height: \_\_\_\_\_ Weight: \_\_\_\_\_ Blood Pressure: \_\_\_\_\_

**Eyes**

2. Best Corrected: OD \_\_\_\_\_ OS \_\_\_\_\_

3. If uncorrected give: OD \_\_\_\_\_ OS \_\_\_\_\_

4. Describe any severe disease/visual defect (including visual fields): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Ears**

5. Can your patient hear normal conversation? Yes  No

If no, please explain. \_\_\_\_\_  
\_\_\_\_\_

**Respiratory System**

6. Lungs: \_\_\_\_\_

\_\_\_\_\_

7. Details of dyspnea, if any: \_\_\_\_\_

\_\_\_\_\_

**Cardiovascular**

8. Chest pain of cardiac origin? Yes  No

If yes, please describe, including symptoms: \_\_\_\_\_

\_\_\_\_\_

9. Peripheral vascular pulses:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

CLAIMANT:  
DDS CASE NUMBER:  
DEA: ATE000

**Abdominal**

10. Abdomen/pelvis findings: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. Organomegaly? Yes  No   
If yes, please describe. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Musculoskeletal**

12. Please provide range of motion (ROM) and describe affected joint(s) and/or spine.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Neurological System**

13. Please describe the following:

- a. Gait: \_\_\_\_\_
- b. Reflexes: \_\_\_\_\_
- c. Sensory: \_\_\_\_\_
- d. Motor: \_\_\_\_\_
- e. Atrophy? Yes  No   
If yes, please describe. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- f. Does your patient have seizures? Yes  No   
If yes, please describe (including frequency). \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Comments:**

14. Please provide comments below on other conditions your patient has which are not already described above.  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Name of Physician (printed)** \_\_\_\_\_ **Physician Signature** \_\_\_\_\_

**Date** \_\_\_\_\_ **Telephone # and extension:** ( \_\_\_\_\_ ) \_\_\_\_\_

CLAIMANT:  
DDS CASE NUMBER:  
DEA: ATE000

**TREATING SOURCE SUMMARY OF VISION FINDINGS**

1. DIAGNOSIS: OD \_\_\_\_\_  
OS \_\_\_\_\_

2. DISTANCE VISUAL ACUITY:

**Without** correction (leave blank if not checked): OD \_\_\_\_\_ OS \_\_\_\_\_ Date \_\_\_\_\_

**With** correction (leave blank if not tested) OD \_\_\_\_\_ OS \_\_\_\_\_ Date \_\_\_\_\_

Most recent **manifest refraction**: Date \_\_\_\_\_ Check here if unknown

OD \_\_\_\_\_ = 20/ \_\_\_\_\_

OS \_\_\_\_\_ = 20/ \_\_\_\_\_

3. Describe any pathological findings: \_\_\_\_\_

4. What surgery has been performed? None

OD \_\_\_\_\_ Date \_\_\_\_\_

OS \_\_\_\_\_ Date \_\_\_\_\_

5. Has formal **Visual Field** testing been done? Check all that apply.

No.  No significant visual field deficit expected.

Yes. Was this a reliable field consistent with ocular pathology?  Yes  No

Date of test \_\_\_\_\_

**Please include the visual field printouts with this report.**

6. Indicate earliest date:

Best corrected VA in the better eye was limited to 20/200 or worse:

N/A \_\_\_\_ Date: \_\_\_\_\_

Residual visual field in the better eye was 20 degrees or less in widest diameter:

N/A \_\_\_\_ Date: \_\_\_\_\_

Please include supporting clinic notes or VF test results for that date.

7. Please comment on **treatment plan** and **prognosis** over the next 12 months:

\_\_\_\_\_  
\_\_\_\_\_

Signature of: Physician  Optometrist  Date \_\_\_\_\_

( )

MD/OD Name (please print) Phone No. Best time to contact you

[Standard Header]

Patient Name: {clmt\_full\_name}

{barcode}

**PLEASE COMPLETE AND RETURN BY** {mer\_return\_date}

**CARDIAC QUESTIONNAIRE**

1) Diagnosis: \_\_\_\_\_ Date of diagnosis: \_\_\_\_\_

2) Date and findings of most recent exam: \_\_\_\_\_  
\_\_\_\_\_

3) Would undergoing exercise testing pose significant risk for your patient?  Yes  No

4) If the patient has chest pain, is it related to a cardiac condition?  Yes  No

If no, what non-cardiac condition is causing chest pain? \_\_\_\_\_

5) Has the patient experienced cyanosis at rest?  Yes  No On exertion?  Yes  No

6) Describe the patient's cardiac signs and symptoms (for example, dyspnea, fatigue, palpitations, chest discomfort, edema, varicosities, stasis dermatitis, ulcerations, claudication).  
\_\_\_\_\_  
\_\_\_\_\_

7) Describe the location, duration, and frequency of the patient's symptoms. \_\_\_\_\_  
\_\_\_\_\_

8) Describe any precipitating factors (for example, physical activity, eating, cold air). \_\_\_\_\_  
\_\_\_\_\_

9) What relieves the patient's symptoms (for example, rest, position, medication)? \_\_\_\_\_  
\_\_\_\_\_

10) Are the symptoms acute or chronic? \_\_\_\_\_

11) Current New York Heart Association class rating: \_\_\_\_\_. Based on this rating describe the patient's physical limitations (for example, difficulty with household tasks, walking, stairs, lifting).

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12) Describe any evidence of neurological complications (for example, ataxia, paralysis, aphasia).

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13) Is there evidence of end-organ damage as a result of hypertension (for example, kidney failure, retinopathy)?  Yes  No

If yes, describe. \_\_\_\_\_

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Treatment:

MEDICATION	DOSAGE AND FREQUENCY

PAST TREATMENT OR RECOMMENDATION(S) (for example, angioplasty, CABG, pacemaker)	DATE PERFORMED OR SCHEDULED



14) Have the symptoms persisted despite treatment? \_\_\_\_\_

\_\_\_\_\_

15) Describe any restrictions to work-related activities, if not previously provided (for example, walking, lifting, carrying).

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**NOTE:** Please submit copies of tracings, testing, and laboratory results, if you have not provided them previously.

\_\_\_\_\_  
Physician's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

[Paperwork Reduction Act]

[Standard Header]

Patient Name: {clmt\_full\_name}

{barcode}

**PLEASE COMPLETE AND RETURN BY** {mer\_return\_date}

**EPILEPSY QUESTIONNAIRE**

1) Date of most recent examination: \_\_\_\_\_

2) Diagnoses: \_\_\_\_\_

3) Indicate the type of seizures:  Convulsive  Non-Convulsive

4) Dates of last two seizures: \_\_\_\_\_

5) Describe typical seizures (include all associated phenomena, such as aura, loss of consciousness, tonic or clonic movement, incontinence, alteration of awareness, unconventional behavior, duration, etc.).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6) Describe postictal manifestations and duration. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

7) If convulsive, when do episodes occur?

Day (with loss of consciousness and convulsive seizures)  Night

8) Seizures witnessed by physician or staff member?  Yes  No

If yes, describe. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

9) Treatment:

MEDICATION	DOSAGE AND FREQUENCY	SIDE EFFECT(S)

10) Other treatment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

11) Are seizures controlled with medication?  Yes  No

If no, explain. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12) Frequency of seizures after prescribed treatment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

13) Serum levels:

DRUG	DATE	RESULT

14) If serum drug levels are therapeutically inadequate, explain further. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

15) Describe any functional limitations resulting from the patient's condition (for example, driving, physical activity, hazardous conditions). \_\_\_\_\_

\_\_\_\_\_

16) Describe any restrictions to work-related activities, if not previously provided (for example, walking, lifting, carrying). \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**NOTE:** Please submit copies of any testing and laboratory results, if you have not provided them previously.

\_\_\_\_\_  
Physician's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone Number

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

[Privacy Act Statement]  
[Paperwork Reduction Act]

**PLEASE COMPLETE AND RETURN BY** [CalcReturnDate]

**CHILD CARDIAC QUESTIONNAIRE**

1. Diagnosis: \_\_\_\_\_ Date of diagnosis: \_\_\_\_\_
2. Date and findings of most recent exam: \_\_\_\_\_  
\_\_\_\_\_
3. Current height and percentile: \_\_\_\_\_ Current weight and percentile: \_\_\_\_\_
4. For children under two: Birth Length: \_\_\_\_\_ Birth Weight: \_\_\_\_\_
5. Has the child had involuntary weight loss or failure to gain weight that has persisted for two months or longer?  Yes  No If yes, provide copies of records to include longitudinal history of height, weight, and growth percentiles. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. For children age six or older, would undergoing exercise testing pose significant risk for the child?  Yes  No
7. If the child has chest pain, is it related to a cardiac condition?  Yes  No If no, what non-cardiac condition is causing chest pain? \_\_\_\_\_
8. Describe the child's cardiac signs and symptoms (for example, syncope, cyanosis, edema, dyspnea, weakness, palpitations, weight loss or gain). \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
9. Describe the location, duration, and frequency of the child's symptoms. \_\_\_\_\_  
\_\_\_\_\_
10. Describe any precipitating factors (for example, physical activity, eating, cold air). \_\_\_\_\_  
\_\_\_\_\_
11. What relieves the child's symptoms (for example, rest, position, medication)? \_\_\_\_\_  
\_\_\_\_\_

12. Are the symptoms acute or chronic? \_\_\_\_\_

13. Describe any evidence of neurological complications (for example, weakness, spasticity, incoordination, ataxia, tremor) resulting from the child's cardiac condition(s).

\_\_\_\_\_  
\_\_\_\_\_

14. Is there evidence of end-organ damage as a result of hypertension (for example, kidney failure, retinopathy)?  Yes  No If yes, describe. \_\_\_\_\_

\_\_\_\_\_

15. Describe any cognitive deficits resulting from the child's cardiovascular disease or treatments for the cardiac condition(s). \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

16. Treatment:

MEDICATION	DOSAGE AND FREQUENCY

PAST TREATMENT OR RECOMMENDATION(S) (for example, pacemaker, defibrillator, corrective surgery)	DATE PERFORMED OR SCHEDULED

17. Have the symptoms persisted despite treatment? \_\_\_\_\_

\_\_\_\_\_

18. Describe any restrictions to age appropriate activities, if not previously provided (for example, acquiring and using information, attending and completing tasks, interacting and relating with others, moving about and manipulating objects, self-care).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NOTE:** Please submit copies of tracings, testing, and laboratory results, if you have not provided them previously.

---

Physician's Signature

---

Date

---

Phone Number

---

Printed Name

---

Title

~~Privacy Act Statement  
Collection and Use of Personal Information~~

~~Sections 205(a), 223(d), 1614(a) and 1631(d) of the Social Security Act, as amended, allow us to collect this information. Furnishing us this information is voluntary. However, failing to provide all or part of the information may prevent us from making an accurate and timely decision on the claimant's eligibility for benefits.~~

~~We will use the information to make a determination of eligibility for benefits. We may also share your information for the following purposes, called routine uses:~~

- ~~1. To Federal, State, or local agencies for administering cash or non-cash income maintenance or health maintenance programs; and~~
- ~~2. To contractors, and other Federal agencies, as necessary, for the purpose of assisting the Social Security Administration (SSA) in the efficient administration of its programs. We contemplate disclosing information under this routine use only in situations in which SSA may enter a contractual or similar agreement with a third party to assist in accomplishing an agency function relating to this system of records.~~

~~In addition, we may share this information in accordance with the Privacy Act and other Federal laws. For example, where authorized, we may use and disclose this information in computer matching programs, in which our records are compared with other records to establish or verify a person's eligibility for Federal benefit programs and for repayment of incorrect or delinquent debts under these programs.~~

~~A list of additional routine uses is available in our Privacy Act System of Records Notices (SORN) 60-0044, entitled National Disability Determination Services File System and 60-0089, entitled Claims Folders Systems. Additional information and a full listing of all our SORNs are available on our website at [www.socialsecurity.gov/foia/bluebook](http://www.socialsecurity.gov/foia/bluebook).~~

~~**Paperwork Reduction Act Statement** - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. We estimate that it will take about 12 minutes to read the instructions, gather the facts, and answer the questions. *Send only comments relating to our time estimate above to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.*~~



***SSA will insert the following revised Privacy Act & PRA Statements into the form as soon as possible:***

**Privacy Act Statement  
Collection and Use of Personal Information**

Sections 205(a), 221, 223(d), 1614(a), 1631(d), and 1633 of the Social Security Act, as amended, allow us to collect this information. Furnishing us this information is voluntary. However, failing to provide all or part of the information may prevent us from making an accurate and timely decision on the claimant's eligibility for benefits.

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- To Federal, State, or local agencies (or agents on their behalf) for administering income maintenance or health maintenance programs, including programs under the Social Security Act; and
- To contractors, and other Federal agencies, as necessary, for the purpose of assisting the Social Security Administration (SSA) in the efficient administration of its programs. We contemplate disclosing information under this routine use only in situations in which SSA may enter a contractual or similar agreement with a third party to assist in accomplishing an agency function relating to this system of records.

In addition, we may share this information in accordance with the Privacy Act and other Federal laws. For example, where authorized, we may use and disclose this information in computer matching programs, in which our records are compared with other records to establish or verify a person's eligibility for Federal benefit programs and for repayment of incorrect or delinquent debts under these programs.

A list of additional routine uses is available in our Privacy Act System of Records Notices (SORNs) 60-0044, National Disability Determination Services (NDDS) File, as published in the Federal Register (FR) on January 11, 2006, at 71 FR 1810; 60-0089, Claims Folders Systems, as published in the FR on October 31, 2019, at 84 FR 58422; and 60-0320, Electronic Disability (eDIB) Claim File, as published in the FR on June 4, 2020, at 85 FR 34477. Additional information, and a full listing of all of our SORNs, is available on our website at [www.ssa.gov/privacy](http://www.ssa.gov/privacy).

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