Tips for Medical Professionals: Writing Effective Narratives

✓ Medical evidence from a physician (M.D. or D.O.) or psychologist (Ph.D. or Psy.D.) is essential for a Social Security or SSI disability claim; with very limited exception, these are the only professionals who can provide the diagnosis of the disease

✓ Nurse or other practitioner can work with physician to prepare letter for physician’s signature or co-signature

✓ Combining a narrative with completion of a Social Security form or questionnaire can be very persuasive

✓ Other professionals, including nurse practitioners, therapists, counselors, social workers, teachers, job coaches, etc. have valuable input, particularly regarding functional limitations and observable symptoms; these professionals can provide additional narrative information within the scope of their professional role/expertise

✓ Specifics are essential; broad conclusions without explanation generally are not helpful

✓ Statement that patient/client is disabled is not generally helpful; statement that patient cannot sustain work, with explanation of specific limitations preventing sustained work, is very helpful

✓ Emphasize treating relationship, including length and frequency of contact

✓ For report from physician or psychologist, read the listing/s relevant to the case before writing the narrative

✓ If you believe patient’s condition meets or equals one or more listings, state your conclusion and explain specifically how you reached the conclusion

✓ Do not assume that Social Security will accept the conclusion that a listing is met; even if you, as the physician or psychologist, believe that patient’s condition meets or equals a listing, it is still important for you to provide additional information on functional limitations

✓ Describe patient’s functional limitations. Again, be specific. Stating that patient is short of breath is not as helpful as explaining that patient becomes short of breath after climbing five steps.

✓ Address broad range of functional limitations that might affect ability to sustain work; functional limitations range from limited ability to lift and carry, to loss of manual dexterity or lack of ability to concentrate or interact with the public; virtually any functional limitation is relevant to ability to work

✓ Review your treatment and other records for your patient; Social Security decision makers sometimes reject a narrative opinion because it appears inconsistent with the other evidence or with the medical records