# Medical Summary Report Template

Use your own agency letterhead and delete the guidance underneath

each heading when submitting to DDS

[Insert DDS Address/Examiner if known]

**NAME:**

**SSN:**

**DOB:**

Dear \_\_\_\_\_\_\_\_\_:

## INTRODUCTION

(The applicant’s physical description, including their behavior, mannerisms, and dress; all of the applicant’s physical and mental health diagnoses; assessment of the applicant’s functioning or appearance)

## PERSONAL HISTORY

(Including abuse/trauma history, educational history, and legal history as they relate to the applicant’s symptoms and functioning)

## OCCUPATIONAL HISTORY

(Employment and military history for the past 15 years; include all jobs, reasons for leaving, job skills, problems with task completion, and relationships with supervisors and coworkers; describe how this relates to the applicant’s symptoms and functioning)

## SUBSTANCE USE

(Substance use history and treatment, including reasons for use, impact of use, treatment history, and any periods of sobriety; describe the applicant’s symptoms while sober)

## PHYSICAL HEALTH HISTORY

(Brief summary of the applicant’s symptoms and treatment for physical health conditions at all providers including context for treatment, diagnoses, medications, and side effects)

## PSYCHIATRIC HISTORY

(Brief summary of the applicant’s symptoms and treatment for mental conditions at all providers including context for treatment, diagnoses, medications, and side effects)

## FUNCTIONAL INFORMATION

(Address all four areas of functioning using detailed examples and quotes to describe how the applicant’s symptoms impact his/her ability to function)

### Understand, Remember, or Apply Information

### Interact with Others

### Concentrate, Persist, or Maintain Pace

### Adapt or Manage Oneself

## SUMMARY

(Brief summary of the evidence provided, restating diagnoses provided in the introduction)

If you have any questions, please call \_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_, or Dr. \_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_.

Sincerely,

[Insert signatures]