

Guidelines for Function Letters Supporting HAP SOAR Claims

One of the reasons why HAP's SOAR project is so successful at obtaining SSI/SSDI benefits for individuals is that we provide detailed information about the claimant's functional limitations resulting from his or her ailments with every claim we submit. We typically do this in letter form. An ideal function letter is written by someone who knows the claimant well (therapist, case manager, housing provider) and co-signed by a physician who has treated the claimant at least once. Letters should be typed, dated, and on agency letterhead. It's best for a HAP attorney to review the letter before it is signed in case any additional information/edits are needed. Once a letter is signed, it must be submitted to the SSA and changes cannot be made.

A typical letter includes:

1. An introductory paragraph that introduces you, the claimant, and explains your relationship/the supports provided through your program. I also include information about the claimant's living situation and supports they receive through that (on-site case managers, supportive living, meals, medication distribution, appointment reminders, etc).
2. Include a brief history of the claimant, including his/her age, ailments, and history of homelessness. It's also appropriate to explain that without supports, the claimant has repeatedly ended up homeless and incarcerated. If the claimant has a lengthy history of trauma that still affects them, it is appropriate to include information about that as well.
3. Describe functional limitations resulting from ailments with examples. I do this using the following headlines with a paragraph under each, assuming that the claimant experiences limitations/struggles in that area. If there are no limitations, omit that paragraph.
 - a. Understand, remember, or apply information. This area of mental functioning refers to the abilities to learn, recall, and use information. Examples include: understanding and learning terms, instructions, procedures; following one- or two-step oral instructions to carry out a task; describing work activity to someone else; asking and answering questions and providing explanations; recognizing a mistake and correcting it; identifying and solving problems; sequencing multi-step activities; and using reason and judgment.
 - b. Interact with others. This area of mental functioning refers to the abilities to relate to people, including supervisors, co-workers, and the public. Examples include: cooperating with others; asking for help when needed; handling conflicts with others; stating own point of view; initiating or sustaining conversation; understanding and responding to social cues (physical, verbal, emotional); responding to requests, suggestions, criticism, correction, and challenges; and keeping social interactions free of excessive irritability, sensitivity, argumentativeness, or suspiciousness.
 - c. Concentrate, persist, or maintain pace. This area of mental functioning refers to the abilities to focus attention and stay on task at a sustained rate. Examples include: initiating and performing a task that you understand and know how to do; working at an appropriate and consistent pace; completing tasks in a timely manner; ignoring or avoiding distractions while working; changing activities or work settings without being disruptive; working close to or with others without interrupting or distracting them; sustaining an ordinary routine and regular attendance at work; and working a full day without needing more than the allotted number or length of rest periods during the day.
 - d. Adapt or manage oneself. This area of mental functioning refers to the abilities to regulate emotions, control behavior, and maintain well-being. Examples include: responding to demands; adapting to changes; managing your psychologically based symptoms; distinguishing between acceptable and unacceptable work performance; setting realistic goals; making plans for yourself independently of others; maintaining personal hygiene and attire appropriate to a work setting; and being aware of normal hazards and taking appropriate precautions.