

Sample “On the Record” (OTR) Request Letter

USE YOUR AGENCY LETTERHEAD

Re: John Smith
DOB: XX/XX/XXXX
SSN: XXX-XX-XXXX

[Today’s Date]

VIA Electronic Records Express

The Honorable Mary Martin
Office of Disability Adjudication and Review
Chief Administrative Law Judge

Dear Judge Martin:

I am respectfully requesting an on the record review regarding Mr. John Smith’s claim for Title XVI benefits. In support of this request the following medical documentation has been uploaded to the applicant’s electronic folder via Electronic Records Express on this date.

- Mental Impairment Questionnaire, Dr. Judy Jones, Grady Memorial Hospital, dated 10/1/23 (3 pages)
- Collateral Letter on Functioning, Jane Adams, Advanced Psychiatric Nurse Practitioner, The Open Door Community, dated 10/5/23 (2 pages)
- Collateral Letter on Functioning, Jon Adams, Outreach Case Worker, The Open Door Community, 10/9/23 (2 pages)
- Grady Memorial Hospital, dates of service, 9/20/23-10/25/23 (25 pages)

Mr. Smith is 54 years old with a master level degree in mathematics and past work as a high school math teacher. He has been diagnosed with Schizophrenia, unspecified, since early adulthood. Mr. Smith has been experiencing homelessness, living on the street for the last 10 years, and has been hospitalized and incarcerated countless times due to the severity of his symptoms and inability to function at even a basic level. Mr. Smith’s mental impairment is so severe that he is unable to care for his daily needs. He requires an intensive support system to remain stable and is unable to function outside a highly supportive living arrangement. Currently, Mr. Smith is receiving 24/7 supportive services from a team of homeless outreach workers and nurse practitioners who tend to his nutritional, hygiene, and medical needs. Mr. Smith’s cognitive functioning has deteriorated to the point where he is unable to perform 2-step tasks, adding single-digit numbers (Exh 5F). Further, the medical records show that Mr. Smith lacks insight into the severity of his mental impairment, as evidenced by his desire to become a college math professor, despite the multiple psychiatric evaluations with findings of cognitive deterioration to the point where he is unable to perform serial 7s (Exh 12F).

Mr. Smith’s impairment meets Listing [*12.03 Schizophrenia spectrum and other psychotic disorders*](#). As documented in the attached medical records from Grady Memorial Hospital, he presently experiences the following symptoms: psychosis, hallucinations, delusions, disorganized speech and cognitive deficits.

Mr. Smith has marked limitations in all four areas of mental functioning, as evidenced by the attached *Mental Impairment Questionnaire* completed by Dr. Judy Jones, the treating psychiatrist, and collateral letters from outreach case workers and nurse practitioners at The Open Door Community (Exh 3F, 4F and 10F). Mr. Smith has marked difficulties in remembering and applying information as evidenced by his inability to perform 2-step tasks, adding single-digit numbers and serial 7s on exam (Exh 5F and 10F). He has marked difficulties in interacting with others including aggression and violence which have led to multiple incarcerations and hospitalizations (Exh 4F, 5F and 10F). Mr. Smith has marked difficulties in maintaining concentration and persistence as evidenced by becoming easily distracted and cannot stay in one place for very long without becoming very anxious (Exh 4F and 10F). Mr. Smith has marked limitations in adapting or managing himself as evidenced by his inability to properly use a restroom, cook or clean for himself, care for his personal hygiene needs, or adapt to residing in transitional housing for an extended period (Exh 4F and 10F). Further, Mr. Smith has a thirty-year history of being diagnosed with Schizophrenia, unspecified, which has led to job and housing losses despite medical treatment and psychosocial support (Exh 4F and 10F). He has been living on the street except for the countless times he has been arrested and incarcerated or involuntarily hospitalized for aggression, violence, hallucinations and disorganized thoughts. Mr. Smith has only been able to adjust to residing in a transitional housing setting for a few months at a time before his symptoms interfere with his ability to sustain stable housing.

We believe that Mr. Smith should be found disabled at the third step of the Sequential Evaluation process because his impairment satisfies the requirements of Listing *12.03 Schizophrenia spectrum and other psychotic disorders*. Please review the attached *Mental Impairment Questionnaire* recently completed by Dr. Jones, treating psychiatrist, which indicates marked limitations on 2 functional areas, and extreme limitations in 1 functional area. Further, the report indicates that Mr. Jones would require support in managing his benefits. We respectfully request that his application be reviewed on the record so that Mr. Smith can begin receiving benefits and access the intensive, 24/7 supportive housing and treatment services that he needs to end his homelessness.

If you have any questions, please do not hesitate to contact me at (555) 555-5555. Thank you for your assistance and consideration.

Sincerely,

Jane Doe, LMSW
SOAR Benefits Specialist
Your Agency