

Medical Source Statement Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · August 2026

A medical source statement is a treating clinician's opinion on what a patient can still do despite mental impairment, rated across the four work-related domains SSA regulation defines: understanding and memory, concentration and pace, social interaction, adaptation. No law mandates a form; HA-1152 is an appeals-stage tool. Supportability and consistency, not the treatment relationship, now decide the weight.

Claimant, source, and treatment relationship who is opining, and on what basis

Do: identify the claim; give your degree, license, specialty, relationship length, and visit frequency; sign and date it yourself.

Pitfall: unsigned or proxy-signed statements; SSA rejects rubber stamps in the exams it purchases, and reviewers discount the same defects here.

Diagnoses, treatment, and response the evidence base, not the argument

Do: state diagnoses with clinical findings, medication and therapy history, response, side effects, prognosis, dated scores.

Pitfall: letting the diagnosis argue the case; the regulatory question is function, and a label alone answers nothing.

Understanding, memory, and instructions domain 1 of 4

Do: rate simple and complex instructions separately, address judgment, and tie each rating to observed evidence.

Pitfall: a checked box with a blank comments field; an unexplained severe rating fails the supportability factor in 20 CFR 404.1520c.

Concentration, persistence, and pace domain 2: sustained, not momentary

Do: describe initiating, sustaining, and completing tasks over a normal schedule, plus recovery after interruption.

Pitfall: presenting off-task percentages and absence counts as required; they are questionnaire conventions, so give numbers only where records support them.

Social interaction, adaptation, and pressures domains 3 and 4

Do: cover supervisors, coworkers, public contact, change, ordinary stress, decision-making, and safety awareness, with evidence.

Pitfall: generalizing from cooperative in-session behavior to a full workweek without saying why the office hour is or is not representative.

Duration, fluctuation, and supporting explanation the statutory test looks at 12+ months

Do: date the onset, quantify the episodic pattern, state expected persistence, and list the records the opinion rests on.

Pitfall: opining "disabled" or "unable to work"; the agency draws the conclusion, and it wants function it can adopt.

Before you sign

- ☐ Every rating tied to a finding, score, or observed behavior
- ☐ In-session presentation vs workweek difference explained
- ☐ Retained abilities stated, not just limits
- ☐ Duration dated: onset, observed months, expected persistence
- ☐ Off-task and absence fields only where records support them
- ☐ Legal conclusion left to the agency
- ☐ Signed and dated by the licensed source

Drafting with AI

Give it your chart summary, measure log, and the request or form; it drafts the four domains with the evidence attached to each rating, flags unsupported severity, and keeps the ultimate-issue opinion out.

"Draft a mental MSS for an SSDI claim: MDD and GAD, 14 months of notes, PHQ-9 trend attached, four domains with evidence for each rating."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

600 to 1,200 words
form plus narrative

30 to 60 minutes
clinical team estimate

Four work domains
defined in SSA regulation

No mandated form
HA-1152 is appeals-stage

Mental Medical Source Statement Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Claimant (initials, age):

Claim or file #:

Report date:

Clinician (name, credentials, license #):

Treatment relationship (first visit, frequency):

Diagnoses, treatment, and response

ICD-10 diagnoses · treatment and response, side effects · dated measure scores · records reviewed and collateral

Understanding, remembering, and carrying out instructions

Simple and complex instructions rated separately · judgment · the evidence behind each rating

Concentration, persistence, and pace

Initiating, sustaining, and completing tasks over a normal schedule · pace and recovery after interruption

Social interaction

Supervisors, coworkers, and public contact · response to criticism and conflict

Adaptation and workplace pressures

Change, ordinary stress, decision-making, safety awareness · evidence for each area

Duration, course, and what the claimant can still do

Onset support · episodic pattern · expected persistence · retained abilities · the agency decides disability

Signature and credentials:

Date: