

SOAR Functional Assessment Statement (FAST) Medical Summary Report (MSR)

[Insert DDS Address/Examiner, if known]

Applicant Name: Collette Marie Rose

Social Security Number (SSN): XXX-XX-XXXX

Date of Birth (DOB): 12/04/1988

Dear DDS Examiner,

Introduction

My name is Will Jones, and I am a case worker with XYZ Community Mental Health Center. I am also the claimant's (Collette Marie Rose) SSA-1696 representative (Rep ID - 1234567890). I am helping her with her disability claim due to the severity of her mental health conditions, associated symptoms, and functional limitations. This statement will summarize Collette's disabling health conditions, associated symptoms, and resulting functional limitations that prevent Collette from working at Substantial Gainful Activity (SGA) level.

Collette is a **33-year-old** woman with an **8th-grade education**. Her **last date of work was 12/21/2021**. She was not working at SGA level during this most recent work attempt.

Collette has been diagnosed with **Bipolar disorder, Major depressive disorder, hypertension, and diabetes**.

Occupational History

- Collette has held four jobs in the past five years. Per her report, she was only able to keep each of these jobs for about 30 days.
 - December 09-21, 2021: Q-mart grocery store, shelf stocker
 - March 2021: Bandito Burrito, customer service, cashier
 - April 2020: Burger House, job title and tasks unknown
 - June 2019: Convenience store, job title and tasks unknown
- Collette reports she struggles with performing tasks at work, particularly using computers. She quit one of her jobs when they asked her to use a computer. She reports being "yelled at" by supervisors for her slow pace at work. During her job at Q-mart, she reported completing some tasks quickly using her "own system," but this system was not what her employer was expecting of her, so she was disciplined. Collette gets very emotional when speaking about her past work experiences.
- I interviewed Collette's former supervisor at Q-mart (Ms. Benedetto). Ms. Benedetto reported Collette worked by herself at night, stocking shelves in the store. Ms. Benedetto reported Collette

frequently needed instructions repeated to her about how to complete tasks, and her work needed to be corrected often. Ms. Benedetto reported Collette worked quickly at times but would place items in the wrong part of the store.

- Per Ms. Benedetto: “Collette said she had her own system of how to do things and became very upset when I asked her to follow the instructions I had given. When I would correct her, even gently, she would burst into tears and was inconsolable. I often had to send her home because she wouldn’t stop crying. After the third time, I realized that she just couldn’t handle working in a convenience store.”
- I also interviewed Collette’s former manager at Bandito Burrito (Mr. Thomas). He remembered Collette even though she only worked at Bandito Burrito in March of 2021 for two weeks. Mr. Thomas reported Collette needed frequent breaks at work due to frequent episodes of crying. She would have to sit in Mr. Thomas’ office and cry during these breaks. Per Mr. Thomas, these crying episodes occurred whenever he tried to correct something Collette was doing or provide direction. Mr. Thomas reported Collette abruptly quit without notice when she was assigned to a computerized cash register.

Physical Health Treatment

- Physical health diagnoses: Hypertension, diabetes
- Physical health treatment:
 - **Hypertension**
 - January 2022 – County General Hospital – Dr. Jackson prescribed metoprolol tartrate 100 mg for hypertension – Collette is no longer taking this medication.
 - **Diabetes**
 - No documented treatment – Collette’s mental health symptoms and homelessness make it difficult for her to follow the recommended diet to manage her diabetes diagnosis.

Mental Health Treatment

- Mental health diagnoses: Bipolar disorder, Major depressive disorder
- Mental health treatment:
 - **May 2022 – XYZ Community Mental Health Center** – Dr. Banes completed a psychiatric evaluation and a mental status exam and diagnosed Collette with Bipolar disorder. Dr. Banes noted Collette’s depressive symptoms of little to no energy, poor personal hygiene, sleeping most of the day, irritability, poor concentration, and excessive crying. Dr. Banes prescribed Collette Amitriptyline 50 mg and Lamotrigine 300 mg to help manage her mental health symptoms. **See the XYZ Community Mental Health Center psychiatric evaluation and mental status exam dated 05/24/2022 for more detailed information.**
 - **April 2022 - Any County Jail** – Dr. Tompkins completed a psychiatric evaluation and a mental status exam and diagnosed Collette with Bipolar disorder. Dr. Tompkins noted Collette’s depressive symptoms of depressed mood, poor energy level, poor hygiene, loss of appetite, poor motivation, slow speech, and frequent crying. Dr. Tompkins prescribed

Collette Amitriptyline 50 mg to help manage her mental health symptoms. **See the Any County Jail psychiatric evaluation and mental status exam dated 04/09/2022 for more detailed information. Please also see the Mental Health Initial Assessment completed by Any County Jail social worker Joshua Hamilton on 04/07/2022, which further documents the depressive symptoms Collette experienced while in Any County Jail.**

- January 2022 – County General Hospital – Collette was taken to County General Hospital by police due to experiencing severe manic symptoms in the community. She was harassing patrons of a local business, talking rapidly, was unable to focus, and hyperventilating. Dr. Jackson admitted Collette for evaluation, stabilization, and medication management and diagnosed her with Bipolar disorder. Her pressured speech and delusions of grandeur lasted for the first 48 hours. She was treated with Lamictal 300 mg and Seroquel 100 mg to help manage her mental health symptoms and help her sleep. She was kept in the hospital for 3 days until she was able to stabilize. **See County General Hospital discharge summary dated 01/08/2022 for more detailed information.**
- June 2005 – County General Hospital – Collette was taken to County General Hospital at age 17 due to a suicide attempt (she took an entire bottle of acetaminophen). Activated charcoal was administered en route to the hospital, and gastric lavage was performed upon admission. Dr. Jackson admitted Collette for evaluation, stabilization, and medication management and diagnosed her with Major Depression. She was treated with Fluoxetine 20 mg to help manage her mental health symptoms. She was kept in the hospital for 9 days until she was able to stabilize. **See County General Hospital discharge summary dated 06/13/2005 for more detailed information.**
- May 2001 – January 2022 – Collette was admitted to County General Hospital 14 times for psychiatric inpatient treatment. **See County General Hospital discharge summary dated 01/08/2022 for the specific dates of these inpatient psychiatric admissions.**

Substance Use

- Collette has a history of using alcohol since age 12. She was most recently diagnosed with Alcohol abuse by Dr. Banes at XYZ Community Mental Health Center (05/24/2022) and by Dr. Jackson at County General Hospital (01/2022). Collette has intermittently used marijuana and cocaine, but her medical records do not indicate a formal diagnosis associated with these substances. Collette's stepfather gave her alcohol at age 12 when he began to abuse her sexually. Collette reported that alcohol helped numb the pain of this abuse. She has subsequently used alcohol to cope with the pain of additional abuse she has experienced in her family of origin, her foster family, in romantic relationships, and caused by the severe symptoms of her mental health conditions. She also has used alcohol to help her sleep while experiencing homelessness. Collette's current alcohol use is intermittent based on a lack of resources and access to alcohol.
- The issue of materiality: **Based on a review of Collette's medical records, specifically records from the County Probation Alternatives Program, Any County Jail, and County General Hospital, Collette's substance use appears not to be material to her disability.**

- Collette attended the County Probation Alternatives Program (an outpatient substance use treatment program) from 12/12/2021 - 02/13/2022 and was sober the whole time. This was confirmed by negative urine tox screens throughout the treatment episode. Collette's counselor at this program, Barbara Jackson, noted that Collette continued to experience severe depressive symptoms and largely struggled to engage with treatment due to these mental health symptoms. **See the County Probation Alternatives Program treatment records dated 12/12/2021 - 02/13/2022 for more information.**
- Collette is currently incarcerated at Any County Jail and has been sober for about nine weeks. Her Any County Jail medical records dated 04/06/2022 – 04/21/2022 document the severe mental health symptoms (primarily depressive symptoms) and functional limitations that she has been experiencing during this current period of sobriety. **See the County Probation Alternatives Program records dated 04/06/2022 – 04/21/2022 for more information.**
- Collette's most recent psychiatric hospitalization occurred in January 2022. Due to the severity of her manic symptoms at the time, she needed to be taken to County General Hospital for evaluation, stabilization, and medication management. Upon admission, she tested negative for alcohol. **Please see the County General Hospital History and Physical Report dated 01/05/2022 for more information.**

Functional Information

Understand, Remember, or Apply Information

- My case management observations: During most of my case management meetings with Collette, her depressive symptoms, including lack of energy and tearfulness, made it difficult for her to answer and respond to questions in a productive way. Collette forgot about scheduled appointments with me. Collette forgot who I was even though we had met on several occasions. Collette forgot the reason she was incarcerated when I asked her about this. **See XYZ Community Mental Health Center progress notes dated 02/22/2022, 05/15/2022, 05/21/2022, and 05/22/2022.**
- Collette's CPS worker's observations: Lauren Smith, Collette's CPS worker, reported she has explained to Collette that obtaining income and housing will help Collette regain custody of her daughter, but Collette forgets these conversations or misses appointments with her daughter due to her depressive and sometimes manic symptoms. **See XYZ Community Mental Health Center progress notes dated 05/22/2022.**
- Collette's former employer's observations: The two former employers I interviewed stated that Collette struggled with remembering short-term details pertaining to completing job tasks, struggled with understanding instructions and workplace procedures, and struggled with recognizing and correcting her mistakes in the workplace. These workplace functional struggles have led to Collette leaving or being terminated from all her past jobs within 30 days. **See XYZ**

Community Mental Health Center progress notes dated 05/23/2022 and the Occupational History section of this report.

Interact with Others

- My case management observations: During all of my case management visits with Collette, she had significant trouble interacting with me. During periods of depression, her depressed mood, slow speech, excessive tearfulness, and low energy level made it very difficult for her to productively engage in conversations with me. During one period of mania, Collette was experiencing rapid speech, flight of ideas, and tangential thoughts and was unable to engage in a two-sided conversation with me or meet for more than a few minutes before abruptly leaving the meeting. **See XYZ Community Mental Health Center progress notes dated 02/22/2022, 03/19/2022, 05/15/2022, 05/21/2022, and 05/22/2022.**
- Collette's CPS worker's observations: Lauren Smith, Collette's CPS worker, reported that when Collette is experiencing depressive symptoms, she often spends entire visits with her daughter crying and lacks the energy to engage with her daughter. **See XYZ Community Mental Health Center progress notes dated 05/22/2022.**
- Collette's former employer's observations: The two former employers I interviewed provided several examples of Collette's struggles with cooperating with others, handling conflict, conforming to rules, responding to requests/suggestions/corrections, tolerating frustration, and excessive sensitivity in the workplace. **See XYZ Community Mental Health Center progress notes dated 05/23/2022 and the Occupational History section of this report.**
- Medical records:
 - County General Hospital: Collette's manic symptoms and inappropriate interactions with others in the community led to her most recent psychiatric hospitalization at County General Hospital in 01/2022. **See County General Hospital discharge summary dated 01/08/2022 for more detailed information.**
 - Any County Jail: Collette's depressive symptoms during her current stay at Any County Jail caused her significant struggles with interacting in a productive way with the jail social worker and psychiatrist. **See Any County Jail Mental Health Assessment dated 04/06/2022 and Psychiatric Assessment dated 04/09/2022.**
 - County Probation Alternatives Program: During Collette's 60-day substance use treatment episode at Probation Alternatives (where she maintained sobriety the whole time), she experienced depressive symptoms that made it difficult to fully engage in treatment and interact with treatment program staff and other clients in a productive way. **See County Probation Alternatives Program notes dated 12/12/2021 – 02/13/2022.**

Concentrate, Persist, or Maintain Pace

- My case management observations: During all of my case management meetings with Collette, her depressive symptoms, and on one occasion, her manic symptoms made it very difficult to concentrate and attend to our conversations and the tasks I was trying to help her complete (filling

out SSA forms primarily). These symptoms also caused her to have a high level of distractibility and made it very difficult for her to focus on details of her life for periods of more than a few minutes at a time. During periods of depression, she exhibited slowness in her speech and thought. **See XYZ Community Mental Health Center progress notes dated 02/22/2022, 03/19/2022, 05/15/2022, 05/21/2022, and 05/22/2022.**

- Collette's CPS worker's observations: Lauren Smith, Collette's CPS worker, provided examples of Collette's struggles with dependability and follow-through pertaining to tasks that would help her regain custody of her daughter that are directly related to the symptoms of her mental health condition. **See XYZ Community Mental Health Center progress notes dated 05/22/2022.**
- Collette's sister's observations: Stephanie Montaine (Collette's sister) provided examples of Collette's struggles with maintaining a routine without reminders or prompting, as well as Collette's struggles with follow-through that are directly related to the symptoms of her mental health condition. **See XYZ Community Mental Health Center progress notes dated 05/16/2022.**
- Collette's former employer's observations: The two former employers I interviewed provided several examples of Collette's struggles with following through on job tasks, concentration at work, completing work tasks in a timely manner and at a consistent pace, inability to work a full day without the need for frequent breaks, struggles with working with others, and distractibility. **See XYZ Community Mental Health Center progress notes dated 05/23/2022 and the Occupational History section of this report.**
- Medical Records:
 - County General Hospital: Collette's most recent manic episode in 01/2022 led to mental health symptoms that made it very difficult for her to focus and concentrate; she experienced rapid speech and was hyperventilating upon admission to County General Hospital. **See County General Hospital discharge summary dated 01/08/2022 for more detailed information.**
 - Any County Jail: Collette's most recent Any County Jail mental health assessment and psychiatric assessment indicate she was experiencing depressive symptoms that caused slowness in speech, thought, and movement and low energy. **See Any County Jail Mental Health Assessment dated 04/06/2022 and Psychiatric Assessment dated 04/09/2022.**
 - XYZ Community Mental Health Center: Collette's most recent psychiatric assessment and mental status exam notes findings similar to Any County Jail (low energy, excessive sleep, only able to concentrate on a conversation for a few minutes at a time). **See XYZ Community Mental Health Center psychiatric evaluation dated 05/24/2022.**

Adapt or Manage Oneself

- Collette's sister's observations: Stephanie Montaine (Collette's sister) reports that she doesn't believe Collette can properly care for herself and requires frequent prompting to complete her ADLs. She went on to report that she (Stephanie) had to care for Collette's children many times during periods of Collette's worsening mental health symptoms (depression and mania). Stephanie provided several examples of Collette's struggles to complete her ADLs, such as bathing, eating,

changing her clothes, and getting her children bathed and fed during periods of depression. Stephanie also reported Collette doesn't know how to clean and do laundry. **See XYZ Community Mental Health Center progress notes dated 05/16/2022.**

- Information from Collette: Collette reports she must be "nagged" by her sister to wash herself, brush her teeth, shower, etc. Collette also reports she struggles to shop on her own and can only be in a store for a few minutes before having to leave. She is unable to cook. She has never managed an apartment on her own and doesn't know how to pay bills. When she tries to take the bus places she easily gets lost. **See XYZ Community Mental Health Center progress notes dated 05/16/2022.**
- Collette's former employer's observations: The two former employers I interviewed provided several examples of Collette's struggles to respond appropriately to the demands of her past jobs and to appropriately respond to changes in the workplace setting. **See XYZ Community Mental Health Center progress notes dated 05/23/2022 and the Occupational History section of this report.**
- Medical records: All of Collette's medical records requested and reviewed for this disability claim (County General Hospital, Any County Jail, XYZ Community Mental Health) indicate that Collette struggles greatly with adhering to treatment for her mental health conditions and struggles greatly with managing her mental health symptoms. She will adhere to treatment during inpatient psychiatric treatment at County General Hospital and while in jail at Any County Jail, but she struggles to maintain this treatment when she gets back to the community. This has led to a long cycle of frequent inpatient psychiatric hospitalizations, incarceration, and homelessness dating back to 2001 (her first inpatient psychiatric hospitalization) to the present. This has also led to Collette's struggles with maintaining a job for more than 30 days at a time. **See medical records from County General Hospital, Any County Jail, and XYZ Community Mental Health Center psychiatric evaluation that have been submitted with this disability claim.**

Summary

Collette Marie Rose is applying for disability benefits due to the symptoms and functional limitations that result from her **Bipolar disorder, Major depressive disorder, hypertension, and diabetes** diagnoses that have caused her an inability to work a job at Substantial Gainful Activity (SGA) level.

This report includes my direct case management observations, information received directly from Collette, information received from her sister, CPS worker, and two of her former employers, and information located in her medical records from County General Hospital, Any County Jail, XYZ Community Mental Health Center, and County Probation Alternatives Program. This writer will submit these records with her disability claim.

If you have any questions or need any further information, please feel free to contact me at 111-222-3333.

Sincerely,

Will Jones

SOAR representative

XYZ Community Mental Health Center

111-222-3333

Dr. John Banes

Psychiatrist

XYZ Community Mental Health Center

111-222-3333