

## GUIDE 05 / PREPARE YOUR EVIDENCE

# Physician appointment and statement preparation

Prepare a useful appointment packet and understand what a medical statement should explain.

What you will leave with: Leave with a clear request, a follow-up plan, and documentation authored by the appropriate clinician.

Use this guide with current official instructions. Complete worksheets privately; do not send sensitive information through the website.

## Understand the purpose before you book

A disability-retirement statement should help OPM understand the medical condition, treatment, expected course, and relationship to the actual demands of your federal position. A diagnosis alone rarely explains that relationship. Your job is to provide accurate work information and describe your experiences. The clinician determines what the medical evidence supports; OPM decides eligibility. This guide prepares a conversation rather than a letter for a clinician to rubber-stamp.

SF 3112C assigns its medical documentation section to the physician. OPM's handbook distinguishes a physician, generally an MD or DO, from other licensed practitioners who can provide supporting medical documentation within their professional scope. Ask HR or OPM about the required author for your circumstances. Include relevant psychologist, therapist, nurse practitioner, or other treatment records as supporting evidence without assuming every practitioner substitutes for the requested physician statement.

## Assemble a small appointment packet

1. Ask the practice whether a separate appointment, records-release authorization, form fee, or longer visit is needed. Explain the purpose and your actual filing timetable.
2. Include your current official position description and relevant performance standards. Highlight duties you need help explaining, without changing the source document.
3. Prepare a one-page factual timeline: symptom changes, treatment, work changes, and accommodation attempts. Label approximate dates.
4. Bring the current SF 3112C instructions and a list of your treating clinicians, medications, treatment responses, and questions. Use the practice's approved delivery method.

Keep the packet readable. A clinician should not have to infer which of hundreds of pages describe your current work. Put a short contents list at the front and identify supporting reports by date. Do not insert a full Social Security number into an ordinary cover email or optional worksheet. Complete identifying fields on official forms using the authorized process.

## Describe function with useful detail

Explain what happens during the task, how often it happens, how long the effect lasts, and what you have tried. Discuss better days as well as flares. Separate what you personally experience from restrictions already documented by a clinician. If you do not know a number, say so; do not invent a precise limit to make a worksheet look complete.

### Your private worksheet

Which three work tasks are hardest, and what does each require?

---

What happens during or after each task? How often, and for how long?

---

What treatment or work adjustment helped? What difficulty remained?

---

Which medication effects have you actually experienced and discussed with your clinician?

---

## Ask the clinician to address the missing questions

- Medical history and diagnosis, relevant examination findings and test results, and the treatment plan. Not every condition has a decisive laboratory test.
- Response to treatment, meaningful side effects, and the basis for any activity restrictions.
- How supported limitations affect the identified duties, attendance, or reliable performance.
- Expected course and duration. For FERS, the relevant expectation is at least one year from the application filing date, not merely one year from the letter date. Give the clinician your anticipated filing date.
- Whether the clinician reviewed the position description and which medical records informed the opinion.

Do not demand a specific conclusion, exaggerate restrictions, or ask a clinician to declare that you can never perform any employment. Federal disability retirement concerns the relevant position and has its own requirements. A clinician may identify uncertainty, recommend further evaluation, or explain that the available evidence does not support the requested opinion.

## Review the completed document responsibly

Check names, dates, position title, signature, contact information, and whether attachments named in the statement are actually included. Ask the practice to correct factual mistakes or clarify an unclear passage. Do not rewrite clinical findings, backdate a statement, add a signature, or delete an unfavorable observation yourself.

SF 3112 asks for current diagnosis, prognosis, and treatment-plan information dated within 60 days before filing. Plan a timely update when needed. This does not mean all older evidence must be discarded: earlier records can establish onset, treatment history, or progression. Current clinical information and relevant history serve different purposes.

## Worked example and completion check

### Fictional worked example

Morgan's job requires scheduled public appointments. Morgan brings the position description, a dated record of interrupted appointments, and treatment notes. Instead of asking for "permanent total disability," Morgan asks the physician to evaluate whether the documented episodes affect reliable appointment coverage and to explain the expected course relative to the planned filing date. The physician independently decides which restrictions and conclusions are supported.

[ ] Position description supplied and receipt confirmed.

[ ] Appointment and any practice fees arranged.

[ ] Factual timeline distinguished from clinical opinions.

[ ] Statement signed, dated, and checked for administrative accuracy.

[ ] Relevant historical records retained and current clinical update planned.

[ ] Submission route confirmed: current employees start ORA with HR; former employees follow OPM's former-employee ORA route. Keep copies and submission confirmations.

## Official sources

OPM: SF 3112 disability documentation package · 5 CFR 844.103: FERS disability eligibility · OPM: CSRS/FERS Handbook, Chapter 60 · OPM: FERS disability eligibility and current application route

Reviewed October 14, 2026. Check current official sources before acting.

TFDR provides independent non-attorney education. These resources are not official forms, legal advice, medical opinions, or individualized tax advice. You prepare and submit your own application. OPM determines eligibility.