

GUIDE 06 / PREPARE YOUR EVIDENCE

Job duties and functional impact workbook

Turn general descriptions of difficulty into specific, sourced examples tied to your position.

What you will leave with: Create a factual duty-and-impact worksheet you can use with your physician, HR, and applicant statement.

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

Start with the real position

A useful worksheet explains your work before it explains your limitations. Gather your official position description, performance standards, and relevant work instructions. Your SF-50 can confirm the position title, series, and grade, but it is not a complete duty description. If a position description is outdated, retain it and separately describe the actual assigned work, identifying the source and period. Ask your supervisor or HR to clarify discrepancies rather than silently rewriting the official document.

This is a preparation workbook, not a vocational evaluation or medical assessment. It cannot establish eligibility by itself. Its value is traceability: another reader can see which duty came from an agency record, which restriction came from a medical source, and which experience you reported.

Break the job into observable demands

1. Choose five to eight important duties. Begin with critical or essential elements rather than every small task.
2. Describe how each duty is performed: location, equipment, pace, concentration, interaction, lifting, travel, or attendance requirements. Include frequency and duration when you know them.
3. Identify the required result or standard. For example, distinguish reading occasional messages from reviewing time-sensitive technical material throughout a shift.
4. Record the source and date for the duty and standard. If the estimate is yours, label it as your estimate.

Your private worksheet

Duty and source document/page:

Normal frequency and duration:

Required standard, schedule, or safety demand:

Tools, environment, and other people involved:

Keep three kinds of information separate

Use separate columns for agency duties, clinician-documented restrictions, and your own observations. A symptom you report may be important even before a clinician documents a corresponding restriction. Label it honestly instead of turning it into a medical instruction. A limitation documented for one treatment period should not automatically be described as permanent or current.

Information	Suitable wording	Source
Agency duty	Conduct scheduled interviews and document results	Position description, dated copy
Medical restriction	Restriction described in signed treatment note	Clinician, note date and page
Your observation	I stopped twice during the interview because symptoms increased	Your dated account; not a medical conclusion

Explain the practical connection without pretending to settle a medical question. "The restriction and task appear to overlap; I need the clinician to clarify" is more accurate than an unsupported conclusion that a duty is impossible. Preserve the clinician's qualifications and time limits when summarizing a restriction.

Describe what changed and what helped

For each difficulty, record when it began, a typical occurrence, and a concrete consequence. Include successful adaptations and remaining problems. Reliable performance, attendance, and conduct are relevant, but a person does not have to deliberately perform poorly to create evidence. FERS regulations also address a disabling condition incompatible with useful and efficient service or retention even without a demonstrated service deficiency.

- Describe a representative day and a flare separately. Avoid presenting the single worst day as every day.
- When using leave totals, identify the reporting period and source. Do not assume every absence was caused by the condition at issue.
- Document temporary help, changed assignments, reduced hours, or coworker coverage so performance records have context.
- Explain accommodation results honestly: what improved, what did not, and how long the arrangement operated.

Build and check your worksheet

Your private worksheet

Duty number, exact wording or faithful paraphrase, and source:

Documented restriction, author, date, duration, and page:

Personal observation with date or representative period:

Practical overlap between the task and the reported limitation:

Adjustment tried, trial dates, helpful effects, and unresolved effects:

Question requiring clinician or agency clarification:

Complete one row at a time. Where a fact is missing, write "not yet obtained" and add a next action. A blank with a plan is better than a confident assumption. Keep documents in a separate evidence folder and use file references in the worksheet so you can retrieve the original quickly.

Worked example and next use

Fictional worked example

Riley's position requires reviewing detailed reports under daily deadlines. Riley reports needing repeated breaks during symptom episodes. A dated physician note discusses limited sustained concentration but gives no task-specific duration. Riley cites that note without inventing a 15-minute restriction, records two representative work incidents, and asks the clinician to assess the report-review demand. The worksheet also notes that a quiet workspace improved interruptions but did not resolve the reported episodes.

[] Duties match identified agency sources.

[] Self-reports are distinct from documented medical restrictions.

[] Frequency estimates and uncertain dates are labeled.

[] Helpful accommodations and better periods are included.

[] Every referenced record can be located.

[] Clinical questions go to the clinician; agency-duty questions go to HR or the supervisor.

[] Use the worksheet to prepare your statement, not as a substitute for SF 3112 documentation or the current ORA process.

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.