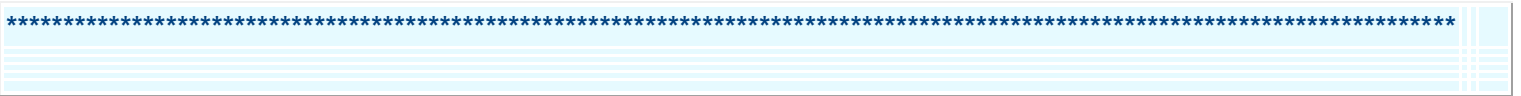


Department of Social and Health Services
Community Services Division
Social Services Manual

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Category: Medical Records
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Summary

Updated section and moved most of this section to CSD Procedure Handbook as part of the Procedure Handbook Expansion workgroup.



Revised on: ~~June 22, 2016~~ ~~August 19, 2024~~ [September 7, 2024](#)

1. The diagnosis of a disabling impairment must be made by an acceptable medical source within 5 years of the SSI application. Once the impairment has been established, SSA considers evidence from other treating providers. Acceptable sources of medical evidence include:
 - a. Licensed physicians (medical or osteopathic doctors);
 - b. Licensed psychiatrists or psychologists;
 - c. Optometrists (for purposes of establishing visual disorders only);
 - d. Licensed podiatrists (for purposes of establishing impairments of the foot, or foot and ankle only); and
 - e. Qualified speech-language pathologists (for purposes of establishing speech or language impairments only).

2. DDDS uses the Medical Evidence of Record (MER) as the primary source of medical evidence to determine disability. This includes:
 - a. Hospital and clinic records;
 - b. Records from the treating physician;
 - c. Evaluations by specialists; and
 - d. Clinical and laboratory findings (such as: x-rays, lab tests, and psychological testing).
3. DDDS arranges consultative examinations with contracted physicians and psychologists (including transportation when requested) when medical evidence does not contain sufficient information to make a disability decision.
4. When completing the Internet Adult Disability Report i3368 for initial applications and the iAppeal for appeals, list the CSO as a source of medical records. All DDDS offices have access to the client's CSD Electronic Case Record.
5. For TANF clients, use Support Services (see WorkFirst Handbook: Support Services Directory) to obtain additional objective medical evidence when the available evidence does not provide enough information to determine if the client appears to meet SSA disability criteria.

Attorney Requests for Records

When an attorney representing a client ~~that is~~ receiving SSI Facilitation services makes a request for additional medical records to assist with the SSI appeal process, SSI Facilitators will follow CSD Procedure: Attorney Requests for Records.

- ~~1.—Ensure that a complete and current DSHS form 17-211 (Authorization for SSI Facilitation Records) is on file.~~
- ~~2.—Determine whether the additional medical evidence is needed to support the SSI application.~~
- ~~3.—If there is not enough information to determine if the medical evidence requested by the attorney is necessary to support the SSI application, the following should be done:~~
 - ~~a.——Deny the request; and~~
 - ~~b.——Contact the attorney for more information.~~
- ~~4.—If the records aren't necessary to support the client's SSI application:~~
 - ~~a.——Send a written notice to the attorney stating the reason that the department has denied their request; and~~
 - ~~b.——Document the action taken in ICMS notes.~~
- ~~5.—If the records are necessary to support the client's SSI application, and aren't already in the EGR:~~

- a. ~~Request the records from the medical provider;~~
- b. ~~Document the action taken in ICMS notes; and~~
- c. ~~Provide copies of the medical evidence to the attorney.~~

NOTE: ~~The medical evidence provider must send records **directly to DSHS**. Do not authorize or pay for copies of records to be sent directly to an attorney under any circumstances.~~

EXAMPLE: The SSIF receives a phone call from an attorney asking DSHS to pay for copies of medical records from the local community hospital. The attorney asks for the complete medical records (e.g. "all records" or "all history") and says that they are being used to "prepare the case for hearing." The SSIF asks what specific records are needed, why those specific records are needed, and if all or part of them are included in the DDDS or CSO records already provided to the attorney. The attorney responds by saying they just want to make sure they have everything. The SSIF denies the request because the need for the records has not been clearly demonstrated.