

Department of Social and Health Services

Community Services Division

Social Services Manual

Revision: # 127

Category: SSI Facilitation– Application: Medical Records

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Division CSD

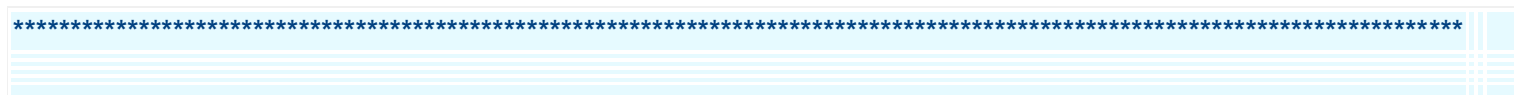
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Summary

Revised and updated the entirety of this page for accuracy. Revised the Attorney Requests for Records section to reflect current processes and eliminated language directing worker to refer these requests to public disclosure.



Medical Records

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. ASSA defines a acceptable sources of medical evidence include as licensed:
 - a. Licensed physicians (medical or osteopathic doctors);-
 - b. Licensed psychiatrists or psychologistsOsteopaths;-
 - c. Licensed Psychologists-
 - d. Psychiatrists-
 - c. oOptometrists (for measurement of visual acuity and visual fields-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. DDS 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). Include dates of any exams scheduled in the future.
3. DDS arranges consultative examinations with contracted ~~p~~Physicians and ~~p~~Psychologists (including transportation when requested) when medical evidence does not contain sufficient information to make a disability decision.
4. When completing the i3368 for initial applications and the iAppeal for appeals, list the CSO as a source of medical records. All DDS offices have access to the client's CSD Electronic Case Record. Include the clear, objective medical evidence used to determine ABD-Cash eligibility, and all available medical records with the application packet.
5. For TANF clients, use Support Services (see WorkFirst Handbook: Support Services Directory) through eJAS to purchase medical records and/or a general examination to obtain additional objective medical evidence when the available evidence for individuals when existing medical evidence is not adequate to determine if does not provide enough information to determine if a person the client appears to meet SSA disability criteria.

Attorney Requests for Records

~~An attorney requesting copies of medical records in DSHS's records (ECR) is making a PUBLIC DISCLOSURE REQUEST. Refer all public disclosure requests to the designated public disclosure officer. The public disclosure officer will coordinate with the social worker to provide copies of records to attorneys per established confidentiality rules.~~

When an attorney representing a ~~person-client~~ that is receiving SSI Facilitation services makes a request for additional medical records to assist with the SSI appeal process, ~~follow these procedures:~~

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 the records are already in the person's electronic case record (ECR), forward the request to the public disclosure officer~~
- ~~4.3.~~ 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 ~~for~~ the attorney for more information.
4. If the records aren't necessary to support the person'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 the ICMS notes.
5. If the records are necessary to support the person's-client's SSI application, and aren't already in the ECR:
 - a. ~~R~~request the records from the medical provider;

b. ~~D~~ocument the action in ICMS_i and

c. ~~coordinate with the public disclosure officer to P~~provide copies of the medical evidence to the attorney.

1. ~~If the records aren't necessary to support the person's SSI application, send a written notice to the attorney stating the reason that the department has denied their request, and document the action taken in the ICMS notes.~~

2. ~~In all situations, the medical evidence provider will send the records directly to DSHS.~~

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