

Handy Tips

- Collaboration and communication with all stakeholders, including medical records department directors and staff, can expedite the process and address usual difficulties. This is a key case manager role.
- Offering training to staff of medical records departments can be very useful in obtaining important information from records.
- Emphasize the financial advantages of cooperating in the provision of information for SSI – getting Medicaid helps to pay for uncompensated care costs.
- Write a letter to thank administrators in facilities or programs where medical records staff have been helpful.
- Having a diagnostic evaluation done prior to the submission of records and other information is not the same as a consultative exam (CE).
- CEs are ordered only when the available information is insufficient for DDS to make a determination.
- When consultative exams are ordered, prepare the applicant.

- Explain the reason for the appointment and its importance.

Example: “This is the doctor who wants to know the difficulties you’ve been experiencing to determine your eligibility for benefits. You don’t have to worry about hiding anything you’ve been feeling from this person. Simply answer the questions honestly and tell all that you feel is important to help the doctor understand.”

- Make sure that the appointment is kept. In many States, DDS agencies will only re-schedule for a total of two to three appointments. Not keeping the appointment can lead to a denial.
- The individual should not dress up or clean up especially for this appointment. Use sensitivity in offering this advice.

Example: “This doctor just wants to see you as you usually are. Don’t worry about making a special effort to dress up. Just be yourself and that will be just fine.”