Medical and Functional Information for SSI/SSDI

Useful evidence for SOAR applications

# Sources of Medical Information

* Psychiatric evaluations
* Physical health evaluations
* Specialty physical health evaluations

(x-rays, CT scans, MRI results)

* Neurological reports
* Laboratory results
* Diagnostic tests
* Neuropsychological tests
* Psychological tests
* Admission and discharge summaries

# Sources of Functional Information

* Bio-psychosocial evaluation reports
* Occupational therapy evaluation reports
* Vocational evaluation reports
* Psychiatric Rehabilitation Day Program notes
* Supported housing progress notes
* Case management notes
* Collateral sources (friends, family members, former employers)
* SOAR Medical Summary Report

# Documenting the Disability

Records documenting medical and functional information are used to support the [SSA Blue Book Listings](http://www.ssa.gov/disability/professionals/bluebook/AdultListings.htm), which are categories of illnesses and conditions and the specific severity criteria that must be met for a person to be considered disabled by the illness or condition.

* For a person to qualify for SSI/SSDI due to a mental illness, the application must provide information illustrating significant functional impairment clearly tied to the person’s diagnosis
* For a person to qualify due to a physical impairment, the application must demonstrate significant limitations in meeting the physical, mental, sensory and other requirements of work
* The disabling condition(s) must be documented by an Acceptable Medical Source, which may be a:
  + Doctor (MD/DO/PhD/EdD/PsyD)
  + Advanced Practice Registered Nurse (APRN), which includes: Certified Nurse Midwife, Nurse Practitioner, Certified Registered Nurse Anesthetist, and Clinical Nurse Specialist
  + Physician Assistant
  + Audiologist
* If medical records are not current, SOAR representatives may need to arrange for assessments to document the disability
* Providing complete medical and functional documentation reduces the need for consultative exams, shortens application processing times, and results in higher approval rates