

MEDICAL SOURCE STATEMENTS

One of the most consequential actions you can take as a Benefits Advocate is to obtain questionnaires or letters from participants' treating providers that address the specific information that SSA wants to know. This effort will likely take some time because it can be a challenge to track down the doctors and therapists who treat a participant - but the payoff can be great if the provider does provide a statement that is helpful to the case.

When a medical provider offers an opinion about the claimant's symptoms and functional abilities as relates to being found "disabled", this is called a **medical source statement (MSS)**.

Which providers should you approach about completing a medical source statement?

You should first ask the participant which of their regular medical providers they think would support their disability case. Participants sometimes think that a provider will be very supportive of their case but in reality, the provider does not think the individual should be found disabled. For this reason, it is very important that you try to speak with the medical provider before you send them the medical source statement so you can get a sense of whether they support the case or not.

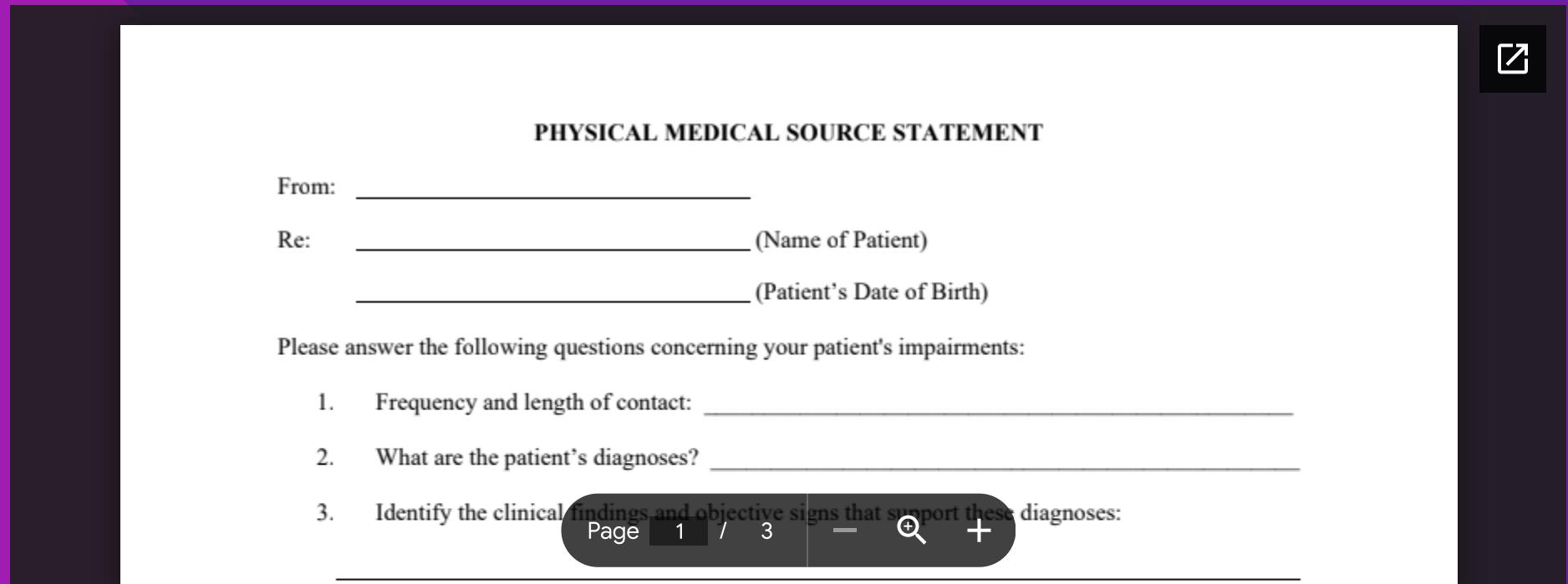
Why do you need to do this? Because under SSA's rules, the medical provider's opinion must be submitted to SSA *even if it is bad for the participant's case*. **If you get the sense that the provider does not think the participant should be found disabled, do not request that they complete a medical source statement.**

What is included in the medical source statement?

We have separate template medical source statements for physical and for mental conditions. We recommend that you do not edit these documents and instead just send them as written.

This is the medical source statement for physical conditions.

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PHYSICAL MEDICAL SOURCE STATEMENT

From: _____

Re: _____ (Name of Patient)
_____ (Patient's Date of Birth)

Please answer the following questions concerning your patient's impairments:

1. Frequency and length of contact: _____
2. What are the patient's diagnoses? _____
3. Identify the clinical findings and objective signs that support these diagnoses:

Page 1 / 3

This is the medical source statement for mental conditions.



MENTAL MEDICAL SOURCE STATEMENT

From: _____

Re: _____ (Name of Patient)

_____ (Patient's Date of Birth)

Please answer the following questions concerning your patient's impairments:

1. Frequency and length of contact: _____

2. What are the patient's diagnoses? _____

3. Identify the clinical findings and objective signs that support these diagnoses:

What if the provider says that they don't know how to answer all of the questions or they can't offer an opinion about the individual's functional abilities?

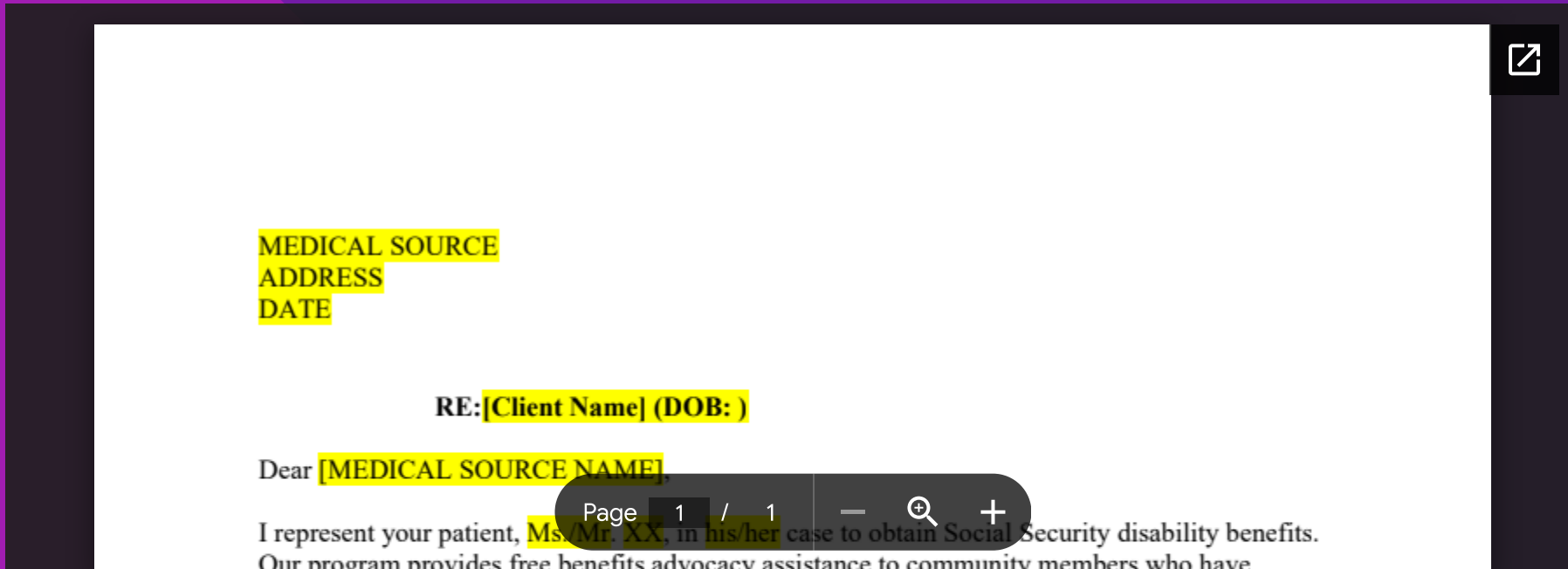
You can reassure the provider that they don't have to answer questions that they can't make reasonable guesses about based on their knowledge of the participant and medicine.

Explain to them, though, that their patient's overall health may improve if they are approved for benefits and the having a thorough medical source statement is very helpful in accomplishing that goal.

We find that respectfully explaining the context for the request can make a big difference in providers' willingness to complete the form.

How should you send the MSS to the provider?

We have a template provider cover letter that you can edit and use as desired to help explain the purpose of the medical source statement to the medical provider. It also gives guidance on answering the questions. We recommend you send this cover letter with the MSS via email or fax to the provider. **You do not send this cover letter to DDS.**



What if you can't reach the provider?

If you have tried repeatedly to reach the participant's medical provider(s) and you cannot get a hold of them, you can ask the participant to speak with their provider. You can give the participant a copy of the MSS provider cover letter that explains how to complete the form and the blank MSS itself and see if the participant has better luck than you do.

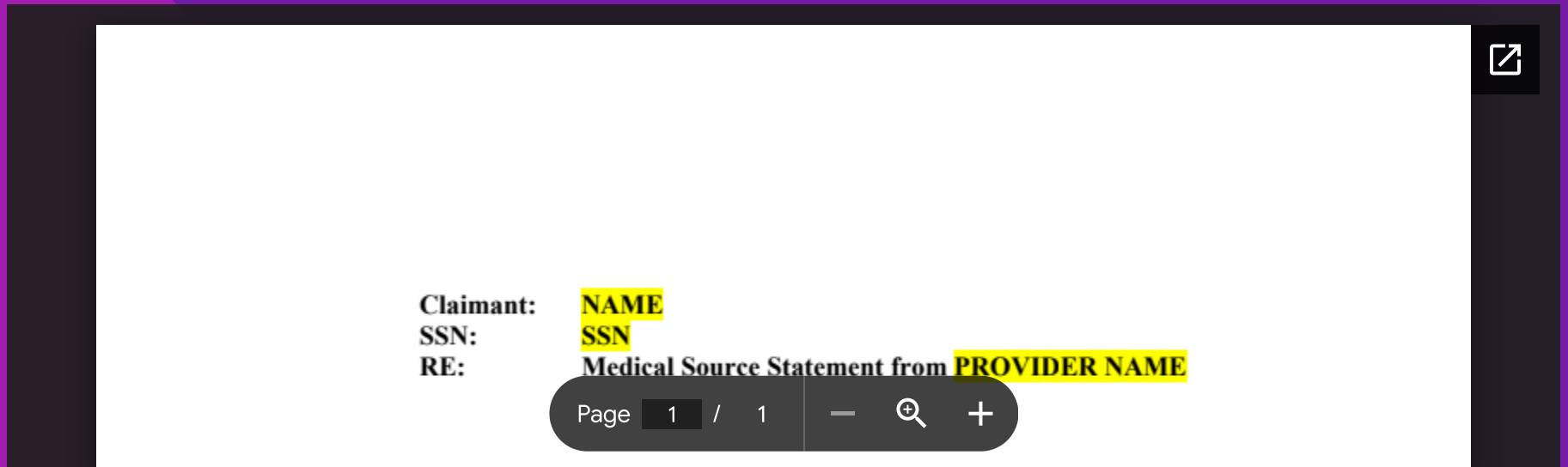
Ask the participant to return the completed MSS to you so that you can send it to DDS directly.

How do you submit the medical source statement?

Fax the completed MSS to the assigned DDS analyst. You can request that the analyst send you a barcode for a medical source statement and then use that or you can use the medical evidence barcode so long as you confirm DDS has labeled it as an MSS in their system.

SSA's rules require that you inform them if you requested a medical provider to give an opinion about the claimant's medical condition and/or functional abilities. You can use our template disclaimer. You need to send this as a cover letter with the completed MSS when you send it to DDS.

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Guide



When should you request a medical source statement (MSS) and when should you submit it?



01

REQUEST AN MSS WHEN YOU ARE PREPARING THE APPLICATION

FOLLOW UP WITH PROVIDER EVERY 2 WEEKS AS NEEDED UNTIL YOU RECEIVE THE MSS



02



03

SUBMIT THE MSS TO DDS AS SOON AS YOU RECEIVE IT

CONFIRM WITH THE DDS ANALYST THAT THE MSS WAS ADDED TO FILE AND LABELED AS AN MSS



04

KEY TIPS FOR MEDICAL SOURCE STATEMENTS



Identify the treating provider early and try to speak with them to assess if they are supportive of the participant being found disabled



Respectfully and diplomatically follow up until you get the completed MSS



Submit the template disclaimer when submitting the completed MSS to DDS



Confirm that the DDS analyst added the MSS to the file and labeled it as an MSS