Sample Medical Records Request Letter

Re:

DOB:

SSN:

Dear Medical Records Staff:

Our program serves adults experiencing or at risk of homelessness and helps them obtain housing, income, services, and other resources. Part of this effort is to help individuals apply for Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI), two disability income programs operated by the Social Security Administration (SSA). In addition to providing needed income support for beneficiaries, both programs provide medical insurance (Medicaid or Medicare) which could reimburse your facility for future as well as previously uncompensated health care services provided to this individual.

To be eligible for disability benefits, individuals must submit their medical records to the State agency that Social Security contracts with to make disability determinations, called Disability Determination Services (DDS). Without this medical information, eligibility for desperately needed benefits is unlikely.

You have provided medical services to the above referenced person. I have enclosed two releases of information (one for SSA and one for our provider agency) signed by the above individual. If you would please send me their medical records as soon as possible, I will ensure that this information is sent on to DDS for review.

For you to have a sense of what is needed from your records, I also have enclosed a list of medical information that can be extraordinarily helpful. Your cooperation is critical for the success of this application and for this person’s recovery.

Additionally, this individual is experiencing homelessness and has no income or resources. We respectfully ask that you waive all fees related to this request for records to be provided as evidence for a disability application.

If you have any questions, please do not hesitate to contact me at (XXX) XXX-XXXX. I thank you in advance for your swift response to this request.

Sincerely,

**Medical Information for SSI/SSDI**

* Admission notes
* Physical examination reports
* Laboratory test results and reports
* Other diagnostic evaluations such as x-rays, CT scans, MRI results, etc.
* Psychiatric evaluations
* Psychosocial history reports (usually from social workers)
* Psychological testing results and reports
* Occupational therapy reports
* Neurological evaluations
* Neuropsychological testing reports
* Any additional evaluation reports
* Progress notes for duration of each treatment episode
* Discharge summaries