

Medical Documentation for School Services, County Services, and Social Security

Medical documentation is the record a physician creates when providing health care for your child. It includes information that you present, examination findings, test results, assessments, and diagnostic considerations, as well as a treatment plan. It may also contain helpful recommendations for schools when writing an Individualized Education Program (IEP), a 504 plan for school accommodations, or an Individual Health Plan (IHP). With your prior authorization, medical documentation can be reviewed by schools to draft such plans. The State Medical Review Team or Social Security may also request this information to determine whether a child is eligible for social security payments, county and state programs for individuals with disabilities, or both.

The most important information to document is how a diagnosis or illness impacts function. Two individuals might have the same diagnosis, but one might be minimally affected and function normally, while the other might be severely impacted and disabled as a result. Some rare conditions have a delayed diagnosis, but still have severe limitations that must be documented.

This article is intended to help you understand how you can assist your doctor in assembling medical records that support your child's program eligibility and advance appropriate school planning.

Ways doctors can help

Parents should share medical records or documentation from their physician to support their child's eligibility for programs and for appropriate school, community, and home planning. For example, in a school setting the doctor's recommendations should be considered when writing an IEP, 504 plan, or an Individual Health Plan (IHP). They should provide information that demonstrates that they have knowledge of your child, how they function, and what their needs are. The doctor may make suggestions as to how the school can meet a child's needs based on their knowledge of the child, family, and disability characteristics exhibited by the child.

Doctors can provide:

- Information for you to share with the school, including notes to the school specific to your child
- Training for the school nurse, teachers, or aides who might be responsible for responding to a medical emergency involving your child. This is common in cases such as when a child has newly diagnosed diabetes, requiring specific individuals in the school to know how to recognize high and low blood sugar symptoms and how to react.
- A template or suggestions for an IHP, which is an action plan on how to respond in a health emergency and is the equivalent of doctor's orders for managing medical conditions such as allergic reactions, low blood sugar, or seizures. Ultimately, the school nurse is responsible for the IHP development and implementation.

- Documentation that a medical condition impairs a major life activity such as concentration, focus, ability to learn, or stamina or can result in frequent absences. This allows these circumstances to be taken into consideration when writing an IEP or 504 plan.
- A request for an assistive technology assessment, equipment, or services based on the impact the disability has on your child

Outside of the school setting, documentation and examples in clinic notes may help your child meet criteria to be certified as disabled for the purpose of receiving county and state services or Social Security benefits.

Ways parents can help

As a parent, you know your child best. You spend the most time with your child and can provide the most accurate details to include in their medical record. In many situations, it is very helpful to keep your own records, so the doctor will have a clear picture of what has happened since your last visit.

Each child has a unique set of circumstances due to their disability. For recurring conditions, it is helpful to know how often symptoms are present, what triggers the condition, how long each episode lasts, and what works to alleviate symptoms. This strategy can apply to behavioral issues as well.

To assist your doctor in writing the best medical documentation, you can:

- Provide examples of behaviors or symptoms with the information described in the above paragraph
- Bring in a summary that is concise so that the doctor can potentially add it to the medical record, if they feel it's appropriate
- Prepare a list of updated information to share with the doctor at each visit
- Make specific requests for a given situation. For instance, if the school doesn't understand the serious nature of your child's allergies, it may be appropriate to ask the doctor to write a note stating what is medically necessary to keep your child safe.
- Document your child's ability to integrate information, make social connections, concentrate, and adapt if they have mental health or behavioral challenges, as these are the specific areas that will be evaluated by the state and Social Security when making a disability determination. This information should be recorded regularly in clinic notes and it is extremely important for you to provide at clinic appointments. Make a point to give examples of where your child struggles in each of these areas and how their challenges differ from those of their peers. See the document titled [Social Security Criteria for a Mental Health Diagnosis: Section B](#) as a reference.
- View these PACER handouts for more information on working with doctors and keeping and organizing medical records
 - Tips for Working with Doctors: [PACER.org/health/pdfs/HIAC-h26.pdf](https://www.pacer.org/health/pdfs/HIAC-h26.pdf)
 - Keeping and Organizing Medical Records: [PACER.org/health/pdfs/HIAC-h17.pdf](https://www.pacer.org/health/pdfs/HIAC-h17.pdf)

See the table on page three for a summary of how medical documentation benefits your child.

How Medical Documentation Benefits Your Child

	Schools	County/state services	Social Security
General uses of medical documentation	<p>IEP: Schools do their own assessment for IEPs and are not obligated to incorporate physician recommendations, but schools should still acknowledge their perspective and consider their recommendations.</p> <p>504: Medical recommendations can be very helpful to define areas where the child needs support on 504 plans, as well as provide suggestions for supports. School must consider incorporating into their plan.</p> <p>IHP: The physician should play an instrumental role in defining steps to take in an emergency. In some situations (e.g., diabetes care), the healthcare provider may have their own form to provide to the school.</p>	<p>Medical documentation is used to determine the eligibility for disability certification. When children are evaluated by their county for state disability services, medical documentation is used to determine if they meet the Social Security Blue Book criteria to qualify as disabled.</p>	<ul style="list-style-type: none"> • Certain diagnoses with appropriate documentation are automatically accepted for Social Security. Some conditions like low birth weight also automatically qualify for one year of Social Security coverage. • Most Supplemental Security Income (SSI) for children is based on household income, regardless of disability. • If a parent retires, becomes disabled, or dies and funds can be drawn off their Social Security account, dependents can receive Retirement, Survivors, and Disability Insurance (RSDI). After age 16, they must meet Blue Book criteria for this to continue.
Mental health documentation	<p>This can be helpful for schools when a doctor can better explain how a child manifests their disability and the potential medication side effects they may experience.</p>	<p>Blue Book criteria for mental health conditions require documentation of ability to integrate information, interact with others, concentrate, and adapt or regulate oneself. There is no “medical test” that can provide this information, only documented examples from the physician’s notes.</p>	
Medical conditions	<p>The physician can describe expected symptoms, what to monitor for, how to treat, and what to expect, including limitations that would interfere with education.</p>	<p>Documentation that provides information about the impact of the diagnosis and interferes with the child’s ability to function, especially in regard to activities of daily living.</p>	<p>Medical diagnoses in the Blue Book generally have specific criteria that may include lab values, findings on studies, and hospitalizations that determine disability.</p>
Nursing care	<p>In complex situations, having a nurse who is already familiar with a child becomes a medical necessity for the child to be supported at school. These cases are supported by the physician’s records.</p>	<p>Based on MnChoices Assessment, which may take physician recommendations into account.</p>	<p>Generally covered by Medical Assistance, Medicare, and/or private insurance.</p>
Transportation	<p>Appropriate documentation can assist in getting transportation coverage written into an IEP.</p>	<p>A form must be completed by a physician in order to apply for Metro Mobility.</p>	<p>Can cover medical transportation and transportation to and from work if individual receives adequate funds.</p>