



Responding to Disability Certification Request

When a patient asks for “disability paperwork” because they are worried about losing Medicaid, first determine what program, benefit, or exemption they are actually seeking. Different programs have different definitions of disability, eligibility requirements, documentation, and time frames.

A psychiatrist's role is generally to provide accurate medical evidence and information about functional limitations, not to determine whether a patient qualifies for a particular benefit. For example, Social Security specifically states that medical professionals provide evidence about a patient's impairments and ability to perform work-related activities, but the medical source does not make the final disability determination.

When evaluating mental disorders, information from treating sources is essential to accurately assess the onset and severity of claimants' impairments and their effect on functional capacity. This applies to new claims, determinations of continuing eligibility for current beneficiaries, and appeals. With your timely response to requests for information, your patients may more quickly start (or continue) to receive cash benefits and Medicare or Medicaid. Without your records, the decision may be made based on the results of a one-time consultative examination by a medical professional who is unfamiliar with your patient.

You can also help assure more accurate and timely decisions for your patients by submitting your records electronically as described below. Electronic processes can make it quicker and easier for medical and other claimant records to be transferred securely, eliminating mail time and automating handling.

<https://www.ssa.gov/disability/professionals/mentalhealthproffacts.htm>

Identify what type of disability or leave is involved

FMLA

- Provides eligible employees with up to 12 weeks of unpaid, job-protected leave for qualifying medical reasons.



- Mental health conditions can qualify when they meet the FMLA definition of a serious health condition.
- A psychiatrist may be asked to provide medical certification supporting the need for leave.
- <https://www.dol.gov/agencies/whd/fact-sheets/28o-mental-health>

SSDI / SSI

- Federal programs for people whose medical conditions prevent substantial work activity and meet Social Security's disability requirements.
- The condition must have lasted or be expected to last at least 12 consecutive months, or result in death.
- SSDI generally requires sufficient work history; SSI is a needs-based program.
- Social Security's definition of disability is specific to its programs and should not be assumed to apply to Medicaid, FMLA, or other programs.
- <https://www.ssa.gov/benefits/disability/qualify.html>

Workers' Compensation

- Provides benefits for qualifying work-related injuries or illnesses.
- Requirements and procedures vary by state.

Short- and Long-Term Disability

- Typically provide income replacement through an employer or private insurance policy.
- Eligibility, duration, and the definition of disability depend on the specific plan or policy.

Medicaid medically frail exemption

- This is not the same as being approved for SSDI or SSI.



- Connecticut's Medicaid work requirements, beginning January 1, 2027, generally apply to certain HUSKY D adults ages 19–64 who do not live with a child under 14.
- Connecticut lists adults with serious mental illness, chronic substance use disorders, and serious or complex medical conditions among individuals who may be exempt as medically frail. The state may require documentation establishing the exemption.
- <https://portal.ct.gov/dss/all-programs/dss-benefits-and-hr1/hr1-for-members/hr-for-members-faq>

Ask for paperwork

Before writing a letter or completing a form, ask the patient to provide the actual notice, application, or certification form.

This helps clarify:

- What program is making the determination?
- What information is being requested?
- What definition of disability or medical eligibility applies?
- Is the request for permanent disability, temporary leave, an accommodation, or a Medicaid exemption?
- What is the deadline?

Do not assume that a request for “disability” means the patient needs an SSDI/SSI application.

What should psychiatrists document?

When documentation is clinically appropriate, focus on medical evidence and functional impact, including:

- Diagnosis and relevant symptoms
- Treatment history and response to treatment
- Duration and expected course of the condition
- Relevant clinical findings



- Functional limitations
- Ability to maintain concentration, follow instructions, interact with others, manage stress, maintain attendance, or perform other relevant activities
- How the condition affects the patient's ability to work or perform daily activities

SSA specifically notes that information from treating mental health professionals is important in evaluating the onset, severity, and functional effects of mental disorders.

[Social Security Administration](#)

Document what is medically supported. Do not certify that a patient is “disabled” simply because they need to maintain Medicaid coverage. The appropriate agency, insurer, employer, or benefits program makes the ultimate eligibility determination. [Social Security Administration](#)

If the patient is seeking a Medicaid exemption

For a Connecticut patient concerned about the new Medicaid work requirements, consider whether the patient may qualify for a medically frail exemption rather than assuming that an SSDI/SSI application is necessary.

Connecticut identifies several categories of people who are not subject to the work requirements, including adults with serious mental illness, chronic substance use disorders, and serious or complex medical conditions. The state may request documentation to verify an exemption. [CT.gov](#)

The patient's eligibility should be evaluated under the Medicaid rules specifically applicable to them, rather than using the Social Security definition of disability as a substitute.

When to refer for additional assistance

Consider connecting patients with benefits or legal assistance when:

- They are appealing a disability or Medicaid determination.
- They have received a termination or denial notice.
- They are unsure which program they should apply for.



- The documentation request involves complicated legal or employment issues.
- They need help completing an SSI/SSDI application.

CT SOAR is a particularly relevant Connecticut resource for eligible adults with serious mental illness and/or co-occurring substance use disorders who are experiencing or at risk of homelessness. SOAR-trained caseworkers can assist with SSI/SSDI applications, medical records, and the disability application process. [CT.gov](https://www.ct.gov)

Resources for Psychiatrists & Patients

Social Security Administration

- [Fact Sheet for Mental Health Care Professionals Social Security Administration](#)
- [Role of the Medical and Education Professional Social Security Administration](#)
- [Social Security Disability Eligibility Social Security Administration](#)
- [Answers for Doctors & Other Health Professionals Social Security Administration](#)

U.S. Department of Labor

- [Mental Health Conditions and the FMLA Department of Labor](#)
- [Information for Health Care Providers Completing FMLA Certification Department of Labor](#)

Connecticut Resources

- [Connecticut Medicaid / H.R.1 Member FAQ](#) — includes current information on Medicaid work requirements and medically frail exemptions. [CT.gov](https://www.ct.gov)
- [CT SOAR](#) — SSI/SSDI application assistance for eligible individuals with serious mental illness and/or co-occurring substance use disorders. [CT.gov](https://www.ct.gov)
- [NAMI: 2025 Work Reporting Requirements and Mental Health](#)

Quick takeaway



Clarify the program → review the actual paperwork → document the patient's medical condition and functional limitations → refer for benefits/legal assistance when needed.

A patient who is concerned about losing Medicaid does not necessarily need to pursue permanent disability. The appropriate next step may instead be documentation for a Medicaid exemption, another Medicaid eligibility category, FMLA or workplace accommodation, or assistance applying for SSI/SSDI.