

# Did You Know?

## Letters of Medical Justification

### A Checklist for Healthcare Providers

A good letter of justification can be the most important document that supports the need for assistive technology (AT). This is true whether the funder is looking at medical needs, educational needs, or vocational needs. Our focus here is on letters of medical justification. The goal of our checklist is to ensure a high quality letter that is most likely to result in a finding of medical necessity and approval of funding through Medicaid or another health insurance program. Every item described below is something we have seen lacking in many letters/reports submitted by health professionals. A more detailed discussion appears in our *AT Advocate* newsletter, *Preparing Letters of Medical Justification: Key Components that Will Support the Need for Durable Medical Equipment through Medicaid and Other Third Party Insurers* (Winter 2006), available at [www.nls.org/av/winter06.pdf](http://www.nls.org/av/winter06.pdf).

#### **Establish the Professional Appearance of the Letter/Report:**

- If the writer is a professional or works for an organization, the letter should be written on appropriate letterhead.
- The letter should be dated and signed.
- White paper should be used to maintain a professional appearance.
- The letter should be typed, proof read, and neat in overall appearance.
- Make letter easy to read by using appropriate fonts, spacing, topic headings, etc.

#### **Introduce and Establish the Writer's Credentials:**

- Establish expert credentials by describing: expertise, licenses, education, current job title, and how long the writer has been doing this work.
- Include relevant classes or clinics taught by the writer or taken as a student, and any articles written that relate to the content of the report.
- Where appropriate attach a resume or curriculum vita.

#### **Establish the Relationship with the Patient:**

- Writer should describe whether he or she is a treating doctor/therapist or a consultant who only saw the patient once.
- Describe how often the writer sees or saw the patient (e.g., one time per month or two times per week).
- Describe how long the individual has been seeing his or her patient (e.g., six months or three years).
- Writer should state that he or she is familiar with the patient's diagnosis and medical needs.

**Educate the Reader About the Patient's Disability:**

- The letter is an opportunity to educate the reader, who may not be a medical professional, about the person's disability.
- Discuss primary and secondary diagnosis, if any, prognosis and any complications that affect the patient's functioning as related to the requested equipment.
- Since patient is seeking a device to overcome the effects of a disability, discuss what those effects are in functional terms.

**Describe the Type of Equipment Being Requested:**

- The writer should not just describe the equipment by model name and number.
- Provide a specific description of the requested equipment.
- Describe any accessories to be included.
- A manufacturer's literature, including pictures, can make it easier for the reader to understand what equipment is sought.

**State Why the Device is Medically Necessary:**

- Explain what equipment is currently being used and why that is not meeting the individual's needs.
- Explain how the requested equipment will help to cure or correct the patient's disabling condition, overcome limitations that result from the disability (e.g., limited ability to walk or communicate), or prevent the condition from worsening.
- Precisely describe why the equipment and each accessory are needed.

**Describe Any Evaluations to Determine Need for Equipment:**

- The writer should describe any evaluations (and their results) that have lead to the current recommendation.
- Include a description of any trials on one or more pieces of equipment, including a proto-type of the one now recommended.

**Explain that the Recommended Device is the Least Costly Alternative:**

- If asking for the higher price item, explain why the similar but lower priced item will not meet the needs that are to be addressed.
- Describe by name the other lower priced items (and even the higher priced items) considered and why they were ruled out.

We cannot overstate the importance of good letters of medical justification. We urge readers to make resources like this document, our newsletters, or similar tools created by you available to the doctors and other professionals who are writing these letters.

Those who are reading this as a list serve posting are encouraged to use "reply all" to share comments or questions that they want to reach all participants on the list serve. Use "reply" to communicate only with the person who did the posting.

Posted by: James R. Sheldon, Jr., ext 262