

## **Checklist for Preparing Referrals to MED**

Please **scan** the following documentation and email to: Med SPD (in Outlook) or [Med.SPD@state.or.us](mailto:Med.SPD@state.or.us). The more information you are able to submit, the more helpful MED will be.

**Please keep the same agency's records together and put each agency's materials in chronological order and all in the same direction.**

### **Section 1: The following MUST be included:**

- ➔ **Basic demographic information** including:
  - Name of individual
  - Age of individual
  - Prime Number
  - Name of case manager or person making referral
  - Local office ID number
  
- ➔ **Summary of the presenting issues.** Summaries should be **signed by the case manager and the supervisor or manager.** Also, include any current coordination with Mental Health.
  
- ➔ **Names, titles, phone numbers and emails of staff**
  
- ➔ **Assessment needs to be:**
  - Complete and current
  - Within the last 3 months
  
- ➔ **Medical records** that are addressing current health issues.
  - Hospital records or summaries. Records should include admission and discharge summaries, consultation reports, medication records, laboratory results and summaries of CT or MRI scans all within the last year
  - Lists of medications (please do not scan the copies of the prescription forms just a list of the medications if not current on OACCESS)

- Records from visits with their PCP
- Test results

➔ **Mental Health records** that include:

- Psychiatric history or mental health outpatient treatment records. Psychiatrist or mental health nurse practitioner notes and therapist notes with in the last year and/or address the issue related to the need for services

➔ **Cognitive testing that includes one of the following:**

- Montreal Cognitive Assessment (MOCA)
- Saint Louis University Mental Status (SLUMS) Examination
- Standardized Mini-Mental State Examination (SMMSE)
- Or other standardized cognitive assessments.

**Section 2: The following is extremely helpful:**

- Evidence of a TBI should be documented if possible. Allegation or anecdotes without documentation can be confusing. **\*\*If TBI is an indicator for eligibility then this is a must\*\***
- Neuro-psychological exam or other evaluations that describe cognitive findings

**You do not need to submit fax cover sheets or release of information. Also, please be careful not to send multiple copies of the same materials.**