



MRT Referral - MA Card Only or MAWD

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A disability determination is needed for certain Medical Assistance (MA) categories. Referrals are submitted through the Disability screen in eCIS and then sent to the Medical Review Team (MRT) by DAP Advocates after requesting medical documentation from the applicant or customer. The MRT determines if the individual is disabled for MA eligibility purposes. Sending a complete referral with sufficient medical documentation is crucial to ensure disability determinations are completed quickly and accurately.

This document provides guidance for completing and sending a referral to the MRT, currently Arbor E&T. The steps below should be followed for MA Card Only for individuals who are only requesting MA and not pursuing SSA Benefits or Medical Assistance for Workers with Disabilities (MAWD). A related document contains information for MRT referrals when the individual is pursuing SSA benefits.

Steps for Initial Referral

1. Complete the Medical Review Team Transmittal ([PA 749](#)) with the following information.
 - Name, Date of Birth (DOB), and Social Security Number (SSN) of individual being referred.
NOTE: If individual is a child, the child's name, DOB, and SSN are to be used.
 - If SSN is not available, enter the reason why in the "Other Information" section.
 - Follow up with the individual to determine if the SSN can be obtained and provide to MRT
 - Name of the referring advocate.
 - Referring County, District, and Case Record number.
 - Select one option in "Reason for Referral" section.
 - If there is a retroactive request date being selected, also select an ongoing reason.
 - Referring advocate's signature, direct phone number, and date of referral.
2. Attach Current, Comprehensive and Supporting Medical and/or Psychiatric Documentation.

Below are examples of acceptable documentation to support a disability determination.

- A current and all-inclusive physical exam report that captures:
 - Signs, symptoms, and duration of the impairment
 - How the impairment(s) affect(s) the individual's ability to function with tasks and/or activities of daily living
- Current Medical Records (**less than a year old**)
- Diagnostic Studies
- Treatment Plans
- Operative Reports

- Laboratory Findings
- Current Psychological/Psychiatric Evaluations (**less than a year old**) that support the symptoms, signs, findings, duration, and functional impact of the impairment.
- **An older evaluation (up to 5 years old)** may be submitted **in conjunction** with current treatment records to establish longitudinal history. All pages of the evaluations must be submitted
- Individualized Education Plans and/or School Evaluations
 - Provides details on how the impairment affects the child's ability to function in an age appropriate-manner in family situations, peer/social relations, academics, and play-recreation
 - Other medical documentation that supports the information captured in the IEP/School Evaluation **must be submitted in conjunction.**
 - MRT **cannot** certify a case with an IEP alone.

NOTE: All the documents listed above do not need to be submitted to confirm a diagnosis or disability. Supporting documentation required will vary based on the diagnosis or disability.

Do NOT submit ONLY Employability, Medical Assessment, and/or Health Sustaining Medication forms to the MRT.

Response Received Requesting Additional Documentation

If the MRT is unable to make a determination of disability and needs additional documentation, the PA 749 will be sent back to the CAO with the "Additional Information" box checked accompanied by a letter containing suggestions of additional documentation which would assist in being certified as Disabled. Staff should follow these additional steps if additional documentation is requested:

1. Send letter received from MRT to the case record holder with a CM584 requesting additional documentation.
2. When the additional documentation is received, follow the steps below.
 - a. On the PA749, indicate "Additional medical documentation is being provided" in the "Requested Additional Information Attached" section.
 - b. Attach the additional current, comprehensive, and supporting medical and/or psychiatric documentation requested by MRT.
 - c. Send PA749 and additional documentation to the MRT.

Additional Information on MRT referrals can be found on the Statewide Procedures Manual [webpage](#) in the document, "[Medical Review Team \(MRT\)](#)."

Questions about this procedure should be directed to PW, DAP-Operations (RA-PWDAP-OPERATIONS@pa.gov).