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TN 2 (07-15)

# PM 00215.001 Medical and Professional Relations Office Roles and Responsibilities

CITATIONS: [20 CFR §§ 404.1603](#)

## A. Introduction of the three SSA operating levels

Social Security Administration (SSA) makes special efforts to inform and gain support of the medical community, particularly physicians. There are primarily the following three SSA operating levels that participate in these activities:

1. Central Office (CO), primarily the ODD, Medical Professional Relations Team;
2. Regional Office (RO) primarily the Center for Disability, Professional Relations Coordinators (PRC); and
3. State Offices, Disability Determinations Services (DDS) primarily the designated Medical and Professional Relations Officer (MPRO). With the active involvement of the following:
  - The DDS Administrator,
  - Chief Medical Consultant, and
  - Other management officials and disability examiners.

## B. Policy principles for SSA and State operational levels

### 1. SSA responsibility

SSA will maintain liaison nationally with:

- medical professions.
- organizations, and
- agencies whose interests or activities may affect the disability program.

### 2. The State responsibility

The State will maintain liaison with the medical profession and organizations that may facilitate performing the disability determination function.

## C. Definition of medical and professional relations

Medical and Professional Relations (M/PR) — these are the special efforts that SSA undertakes with the medical community.

## D. Operating policy and responsibilities

Each operating level is responsible for their roles in the efforts to inform and gain support of the medical community.

### 1. Objectives for medical and professional community

The objective of M/PR at each level is to ensure that:

- a. The medical community is aware of the disability program's medical evidence requirements.
- b. The medical evidence of record from treating sources is received timely and is of the highest possible quality.
- c. Adequate medical resources are available to review claims and to provide consultative examinations (CEs).
- d. Potential fraud is identified and tracked.

### 2. ODD responsibilities

The role of ODD is to:

- a. Provide pertinent and timely program information to the medical community.
- b. Obtain information from medical organizations on disability policies and issues.
- c. Assist regions and DDSs with recruiting medical evidence providers.
- d. Keep the ROs and DDSs informed on national M/PR issues and activities.
- e. Provide speakers, training, and informational materials as necessary.
- f. Advise on the availability of CO prepared materials including:
  - publications, pamphlets, fact sheets;
  - audio and video materials; and
  - training packages.
- g. Obtain information through ROs about M/PR activities and issues at the RO and DDS levels.
- h. Develop and maintain specific national M/PR material such as:
  - [Consultative Examinations: A Guide for Health Professions](#).
  - [Consultative Examination Guide for Physicians](#).
  - Continuing Medical Education (CME) packages.
  - DDS recruiting materials and timeliness guidelines.

### 3. RO responsibilities

The RO will serve as a link between ODD and the DDSs and assist MPROs

in the DDSs in obtaining materials and guidance from ODD in connections with M/PR projects and events, in addition to:

- a. Keep ODD informed of M/PR activities, problems and the needs of MPROs in the region, focusing on successful M/PR techniques and tools used by individual DDSs and MPROs.
- b. Provide technical direction of M/PR programs and activities for each DDS in the region. This includes reviewing the effectiveness of each DDS's:
  - Process for obtaining medical evidence.
  - Ongoing relationship with the medical community.
  - Relationships with other interested organizations/individuals (e.g., advocacy groups, attorneys, and social agencies).
- c. Serve as conduit for information sharing among DDS MPROs in the region:
  - Establish and maintain a system for obtaining information from the MPROs on M/PR matters, and providing regular feedback to them.
  - Initiate and coordinate regional M/PR training seminars and other meetings as needed.
- d. Assist MPROs, as needed, in dealing with other agencies and institutions like the Veterans Administration Medical Centers and other medical entities.
- e. Ensure to address the MPROs concerns in reviews conducted by the RO.
- f. Recognize outstanding M/PR activities of DDSs or MPROs.
- g. Coordinate (through the regional public affairs officer) joint FO and DDS professional relations or public information activities.
- h. Assist with training efforts and monitoring of medical personnel.
- i. Complete Annual Oversight Report consistent with procedures in [PM 00233.005](#). (For evaluating DDS management of the CE process also see RO guide in [PM 00233.900](#)).

#### **4. DDS responsibilities**

The DDS will serve as one of the links between SSA and the medical community. Fostering relationships with medical entities and maintaining oversight of their activities.

##### **a. Liaison with physicians and other interested organizations**

The DDS will serve as a liaison with physicians and other interested organizations including:

- Inform and educate medical and other disability and medical organizations, agencies, institutions, and individuals about SSA's disability program requirements, and the information needed on medical reports, which would help to improve the quality and timeliness of medical decisions.
- Enlist the cooperation and support of disability and medical organizations and individuals on policies and operations affecting them.

- Keep DDS officials and the RO informed about successes, problems, or potential problems encountered with organizations or individuals.
- Encourage providers to utilize the agency's electronic options to submit evidence.

**b. Medical recruitment activities**

The DDS will continue to recruit CE providers to help ensure adequate panel staffing.

**c. CE oversight activities**

The DDS will be responsible for undergoing the following CE oversight activities:

- Assist in training and monitoring the CE providers.
- Assist in handling reporting and payment problems.
- Investigate instances where CE reports are inadequate.
- Conduct onsite visits to CE providers.
- Investigate complaints about the conduct of CE providers.
- Ensure sources are currently licensed and without federal sanction.

**d. Special Liaison and recruiting activities**

In addition to regular CE Oversight activities, the DDSs responsibilities also includes but is not limited to the following activities:

- Establishing ongoing contacts with State and local medical associations, individual physicians, hospital and clinic administrators, and others interested in the disability program (e.g., organizations that serve the disabled, bar associations, consumer advocacy groups).
- Furnishing appropriate information leaflets, pamphlets and publications to individuals and groups in the health community.
- Participating in meetings and conventions of State and local medical associations and other interested organizations.
- Conduct studies or surveys to obtain data on medical evidence providers, for use in identifying M/PR problem areas for MPRO actions.
- Promote the use of the Electronic Records Express (ERE) Website.

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## Section History

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### Prior Versions of Section

Effective Date	Title
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09/24/2003 - 07/21/2015 [Medical/Professional Relations - Roles and Responsibilities](#)

01/27/1999 - 09/23/2003 [Medical/Professional Relations - Roles and Responsibilities](#)

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