

School: ATEC – Medical Management
Course: Drafting A “Winning” Advocacy Letter to Psych Doctors
Faculty: Dr. Ron C. Heredia, Director, Good Mood Legal

Summary

In the course titled "Drafting a Winning Advocacy Letter to Psych Doctors," Dr. Ron C. Heredia provides comprehensive guidance on crafting effective advocacy letters aimed at psych doctors—psychologists, psychiatrists, and neuropsychologists. The session emphasizes the importance of these letters in ensuring that psych reports meet the standards required for workers' compensation claims.

Dr. Heredia begins by highlighting the significance of substantial medical evidence in psych reports. He explains that conclusions drawn by medical experts must be strongly supported by medical evidence. The advocacy letter should guide psych doctors to provide detailed and supported conclusions in their reports, focusing on areas such as the patient's life history, presenting complaints, mental status examination, psychological testing, and review of medical records.

One of the key areas discussed is the importance of a thorough qualitative history. Dr. Heredia introduces the FIDOC framework—Frequency, Intensity, Duration, Onset, and Course—as essential elements that should be included in the patient's symptom history. He notes that many psych reports lack this detailed information, often providing only summary conclusions without sufficient observational data. By specifying in the advocacy letter that the doctor should include these details, the quality of the psych report can be significantly improved.

Dr. Heredia also addresses the mental status examination, which is a crucial part of the psych evaluation. He explains that this examination should include observations of the patient's memory, mood, concentration, insight, and judgment. However, many psych reports only provide summary conclusions without describing the observations that led to these conclusions. The advocacy letter should instruct the doctor to include detailed descriptions of their observations to support their findings.

Psychological testing is another vital component covered in the course. Dr. Heredia emphasizes the importance of including psychological tests, such as the Minnesota Multiphasic Personality Inventory (MMPI), in psych reports. He notes that the MMPI is considered the gold standard in psychological testing due to its ability to assess the credibility of the patient's complaints. The advocacy letter should specify that the doctor administer and include the results of psychological tests, along with their interpretations, in the report.

Furthermore, Dr. Heredia discusses the significance of reviewing and discussing the patient's medical records in psych reports. He advises that the advocacy letter should instruct the doctor to provide a thorough review of all medical records sent prior to the examination. This ensures that the psych report is comprehensive and considers all relevant medical information.

Dr. Heredia also touches on the use of collateral sources of information, such as interviews with the patient's family, friends, or coworkers, when necessary. This is particularly relevant in cases where the patient cannot provide a reliable history themselves.

Finally, Dr. Heredia emphasizes the need for clear communication in the advocacy letter regarding the expectations for the psych report. This includes specifying that the report should state whether the patient meets the diagnostic criteria for any psychological disorder according to the DSM (Diagnostic and Statistical Manual of Mental Disorders) and providing the rationale for any treatment recommendations.

In summary, Dr. Heredia's course provides valuable insights into drafting effective advocacy letters that guide psych doctors to produce thorough and competent reports. These letters play a crucial role in ensuring that psych reports meet the standards required for workers' compensation claims, ultimately leading to more accurate and reliable evaluations.

Learning Objectives

1. Understand the critical components and structure of a comprehensive advocacy letter to psych doctors.
2. Identify key elements that should be included in advocacy letters to ensure substantial medical evidence.
3. Learn the importance of including specific patient histories and symptom details in advocacy letters.
4. Gain knowledge of psychological testing and the role it plays in psych evaluations and reports.
5. Explore strategies for guiding psych doctors through advocacy letters to produce thorough and competent reports.

Primary Takeaways

1. Advocacy letters must guide psych doctors to include detailed patient histories, symptom frequencies, and psychological test data to ensure substantial medical evidence.

2. Effective advocacy letters address common deficiencies in psych reports by specifying the expectations for mental status examinations and the inclusion of observational data.
3. Psychological testing, particularly the MMPI, is crucial for assessing patient credibility and should be included and detailed in psych reports.
4. Advocacy letters should instruct psych doctors to discuss the DSM criteria used and whether the patient meets these criteria for any given diagnosis.
5. Details matter in advocacy letters, and providing specific guidance on the inclusion of various patient histories, symptom details, and treatment rationales can improve the quality of psych reports.

Course Outline

- 1) Introduction to Advocacy Letters
 - a) Importance of advocacy letters in psych evaluations
 - b) Goals of the session
- 2) Components of a Comprehensive Advocacy Letter
 - a) Substantial Medical Evidence
 - i) Definition and importance
 - ii) Common deficiencies in psych reports
 - b) Patient's Life History and Presenting Complaints
 - i) Familial, educational, military, marital, and occupational history
 - ii) Complete qualitative history using FIDOC (Frequency, Intensity, Duration, Onset, Course)
 - c) Mental Status Examination
 - i) Observations vs. summary conclusions
 - ii) Importance of detailed descriptions of memory, mood, concentration, insight, and judgment
- 3) Psychological Testing
 - a) Importance of psychological tests in psych reports
 - i) Objective data and credibility assessment
 - ii) The MMPI as the gold standard
 - b) Including Test Results in Reports
 - i) Scores and interpretations
 - ii) Addressing elevated validity scales
- 4) Review of Medical Records and Collateral Information
 - a) Thorough review and discussion of medical records

- b) Collateral sources of information
 - i) When and how to use them

- 5) Addressing Specific Symptoms and Treatment Rationales
 - a) Sleep Problems
 - i) Baseline and changes post-injury
 - b) Permanent and Stationary or MMI
 - i) Rationales for additional treatment recommendations

- 6) Details and Expectations
 - a) Including DSM Criteria and Diagnostic Versions
 - i) Ensuring the report meets the diagnostic criteria
 - b) GAF Scores and Apportionment
 - i) Requirements for comprehensive reporting

- 7) Conclusion
 - a) Recap of key points
 - b) Importance of detailed and well-crafted advocacy letters
 - c) Contact information for further questions and consultation

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