

## SOAR Dialogue Highlights 4/16/19

Attendees: Emily Carmody, Janet Harris, Pamalia Davis, Tara Gilbert-Ross, Natasha Posey, Connie Ness, Kathryn Coiner-Collier, Christina Heggins, Jessica Modra, Tonya Lawrence

### Introductions

- Emily Carmody, NCCEH, Raleigh- Had a great training in Charlotte in March
- Janet Harris, Monarch, Raleigh- Identified first applicant
- Pamalia Davis, Housing for New Hope, Durham- waiting on referrals
- Tara Gilbert Ross, VAMC, Fayetteville- Established 3 protective filing dates, taking to SSA in May, list of 27 referrals
- Natasha Posey, Southlight, Raleigh- Excited to be back after medical leave
- Connie Ness, Southlight, Raleigh- 1 award made
- Kathryn Coiner-Collier, Atrium, Charlotte- 3 SSI approval, 1 SSDI approval, 1 denial
- Jessica Modra, Mecklenburg County Mental Health Court, Charlotte- just sent in 1696 form for hearing representation, collecting records, hearing in July
- Tonya Lawrence, Quality Homecare Services, Charlotte- newly trained in SOAR

### Announcements

- State conference on homelessness is coming up in May! If you have not done so already, be sure to register: <https://nchousing.org/bringing-it-home-conference-2019-2/>
- Be sure to submit SOAR outcomes to Emily! Annual outcome data will be due by June 30<sup>th</sup> which will be here before you know it. Please make sure your SOAR outcomes are up to date so your great work can be counted.

### Partnering with SSA and DDS

#### *Overview*

SSA and DDS are key agencies that SOAR Caseworkers need to work with to complete applications. Challenges can come up in partnerships with both agencies. On the call, caseworkers reviewed common challenges, shared tips for addressing them, and reviewed how to escalate issues that need to be addressed.

#### *SSA Field Offices*

Common challenges and tips to resolve these issues were discussed:

- Getting copies of letters as the 1696 Representative
  - Not getting letters is an issue for some caseworkers
  - SSA Claims Reps have to check a box after filing the 1696 Rep form to ensure mail is sent
  - Some caseworkers list their address as the claimants address to receive mail
  - Working with the SOAR point of contact to address mail issues
- 1696 Rep Form not being filed

- If dropping off, make sure to put everything in one packet and seal envelope so that the SOAR contact knows if it has been opened
- DDS has addressed this issue with SSA as well to improve process
- Field office is unresponsive- not returning calls, faxes, etc.
  - Invite SSA to your disability workgroup meetings to improve relationships
- Escalating issues with SSA Field Offices
  - SOAR caseworkers should first try to address issues at the local field office with the SOAR contact
  - Next, SOAR caseworkers can request to meet with the SSA field office to discuss issues and create solutions together
    - It is best to have all SOAR caseworkers at one meeting with SSA
    - Bring specific case examples of the issues you are raising
    - Call Emily to talk through the meeting and she can help by attending as well
  - If a meeting is ineffective, call Emily and she will escalate the issue with the Area Regional Director's Office to see if the state SOAR SSA contact can address

#### *DDS*

- There have been recent changes at DDS:
  - SOAR cases will now be assigned to 12 Examiners who are the most experienced (Level 3.5)
  - Emily did a training for the Examiners to provide background and familiarity with SOAR
  - New leadership at DDS has provided more opportunity for a feedback loop- DDS will meet quarterly with Emily to address any issues and discuss ways of improving the process
- If SOAR caseworkers are running into issues with DDS as they process a case, call Emily while it is still be processed. Common issues are:
  - Not getting call backs from Examiners
  - Not able to get medical documentation to DDS
  - Difficulty rescheduling CE exams
- It is easier to address issues with DDS while the case is still being processed than trying to go back and correct after a decision is made.
  - Emily can escalate to her SOAR contact at DDS to follow up on issues.

Next SOAR Dialogue Call will be May 28th at 10 AM: <https://www.ncceh.org/events/1343/>

