

## SOAR Dialogue Highlights 7/21/20

### Introductions

- Sarah Murray, NCCEH, Raleigh
- Pamela Bowers, Supportive Community Housing, Charlotte, working on 2 cases
- Vinett Daley, WakeMed, Raleigh
- Kenneth McEarn, Hickory
- Jane Duralia, Greater Hickory Cooperative Christian Ministries- working on 4, 3 on the waitlist
- Nana Knowles, Fayetteville, SSVF- 2 active cases
- Stacey Costner- Cleveland County, Shelby- recent approval, working on a recon
- Pamalia Davis, VOA, Durham- 2 cases at DDS with CEs
- Christina Heggins- Charlotte, 6 cases
- Dora Speight- Servant Center, Greensboro
- Kathy Walker- Pisgah Legal, Asheville
- Melody Bailey- Morganton Easter Seals- 2 new cases
- Amelia Brenner- RRH in Raleigh
- John Harris- WakeMed CCM, Raleigh

### Announcements

- Annual Outcome Data
  - You all completed **343 cases**
  - with an **approval rate of 66%**
  - You helped **225 people** get their benefits
  - The average case was **completed in 117 days (100 days median)**
  - You all brought in **\$3,928,564.06 of income** into our state
- SOAR OLC
  - Let people know they can get trained, self paced
- Next few Dialogue calls
  - Legal Aid
  - Vocational Rehabilitation

### What to do after an applicant is approved?

SSA Follow Up Appointment-

After clients are approved for benefits, SSA schedules a follow up appointment with them to review necessary paperwork to turn benefits on. SOAR caseworkers are encouraged to attend this meeting with the applicant and to prepare documentation ahead of time to make this process go smoothly.

Currently, during the pandemic, these appointments are happening over phone.

Some caseworkers prep client ahead of time for caseworker to do most of the talking as applicants may inadvertently give incorrect information

SOAR caseworkers need to be sure to prepare:

- If a payee is needed, identify who this will be (professional/personal) and contact them ahead of time
  - Bring paperwork completed for professional payee service
  - If a personal payee (family/friend), have them come to the follow up appointment if possible
- Take a portion of the file and make sure you know the current status of:
  - Housing-
    - Are they still homeless?
      - Obtain verification letter from shelter/provider
      - Prepare details of where if unsheltered- provide cross street or pictures if possible
      - Documentation from family member if they are staying with someone
    - Know if they have been in jail or state hospital for a full calendar month since the PFD or in the past year (this could affect backpay)
    - If in a rental situation, bring lease.
    - If in a housing program, bring paperwork from the program to show the person will contribute towards their rent once they have income
    - Find out if housing agency is exempt so SSA can flag it
  - Marriage documentation if necessary
  - Working- bring pay stubs and paperwork
  - Confirm PFD

Payee-

Many SOAR applicants are required to have a payee to help them budget their benefits.

SOAR Caseworkers foster relationships with professional payees:

- Hear feedback from clients who have used past people can help vet professional folks
- Google also helps
- Helping applicant complete application and payee can help with the rest with SSA
- Can have rep payees come talk to disability workgroups
- Disability Rights NC can investigate company if there are problems with rep payees
- Professional payees have cap on how much they can charge in statues (typically around 10% but some exceptions)

Things to think through if the applicant wants to choose a family or friend:

- Talk through challenges- can get sticky if relationships fall out for example
- SOAR caseworker can let SSA know about concerns with choice of payee
  - SSA will then ask follow up questions to determine if appropriate

SOAR caseworkers need to have conversations with applicants about the possibility of a payee.

- The payee conversation needs to start long before a decision is reached
- Make sure the applicant understands the role of the payee
  - They get to work with the payee to set the budget
  - The payee will take care of their bills to make sure housing is stable and needs are met
  - Payee can help address budgeting issues that they may have already identified

- If the beneficiary is concerned that the payee taking money, they can request a report from the payee for a full accounting of how the money was spent

**Open questions:**

Resources re FASD and co-occurring SA use-SAMHSA may be a good resource

How/when do applicants get assigned payee? DDS determines but SOAR caseworker can recommend, can get doctor to fill out letter recommending later if there are problems managing benefits

**Next SOAR Dialogue Call will be on August 18, 2020 at 10 AM. Please register for the call here:**

<https://www.ncceh.org/events/1431/>