

July SOAR Dialogue Call





Announcements

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- Outcomes!
- Anyone having delays with SSA waiting on a PERC (benefits starting after DDS decision made)?





Obtaining Records

SOAR Model

- Obtaining records is a cornerstone of the SOAR model
- We submit these to DDS
- Also assist us in writing the MSR





Compound Authorization

Compound Authorization

- Your agency release and the SSA-827
- Should be submitted together
- Allows records to be released to you and then for you to submit to DDS
- May be helpful to include letter explaining:
 - Compound Authorization
 - Why you are requesting records
 - A little about the SOAR program





Challenges in Obtaining Records

Not Receiving Records in a Timely Fashion

- Response times vary by providers and even within the same medical records departments depending on who gets the request for records
- Outreach and engage medical record department staff
- Delivering requests in person can help the staff to put your face with your name if possible
- A lot of times medical records staff have questions about disability benefits that you can answer for them



Providers Have Specific Releases

- Make sure to check with providers to see what their preferred forms are
- The path of least resistance is to use the provider's form
- Make sure to use their form but still submit two releases to make it a compound authorization



Providers not Accepting SSA- 827 Release

- Helpful to explain to staff that the SSA-827 is a federal form that is HIPAA compliant
- If they still refuse to accept the SSA-827:
 - Use a form that they will accept
 - Ensure it has language included for a Compound Authorization so you can submit records received to DDS
- The SOAR national website has multiple examples of releases and cover letters: <https://soarworks.samhsa.gov/article/soar-tools-and-worksheets>



Applicant Cannot Sign Release

- Potential workaround:
 - Have client make a mark
 - Have space for witnesses to sign to confirm who is signing the form
- Rare but if a higher level of verification is needed:
 - Have a notary confirm the signature



Records Are Destroyed

- Common that providers destroy records after a certain period of time (5 years, 10 years, etc.).
- If this is the case, address in the MSR:
 - Include the treatment episode based on the applicant's memory of what happened
 - State that you requested these records, but they are destroyed



Large Medical Records Companies

- Some providers contract out the medical record management to large companies who are:
 - Harder to engage
 - May charge fees
 - Have other barriers to getting records.
- Many times the local medical records staff can intervene to make sure that the larger company does not charge you:
 - Explain that you are not charging a fee for the SOAR application and/or you work for a nonprofit



Providers Have Closed

- When providers close, they should have a plan of where to store those records
- If it is a mental health provider, contact the local LME/MCO that manages that area to see where those records are located



Providers Charging for Records

- NC State law does allow providers to charge
 - However statute states that fees are waived for DDS requests for disability application
- Many Medical Records Departments assume that you are an attorney or that an attorney who is taking a fee is involved since you are working on a benefits application
- Important to explain who you are and that you are not taking a fee for this case:
 - First in cover letter
 - If that does not work, in person/over phone



Other Tips

Engagement with Medical Records Departments

- Offer to make the copies or bring paper for records to be copied on
- Offer to pick up the records at a designated place and time
- Say “hi,” even when no requests are pending
- Remind staff how critical they are in process
- Bring flowers, candy, brownies, etc. to show your appreciation
- Report to higher-ups that staff help the agency receive more Medicaid/Medicare dollars



Tips

- Consult with local leads or other SOAR CMs re how they obtain records from specific providers
- If you cannot get the records after due diligence in trying, let DDS know and they will still request
 - You do run the risk of not knowing about information that is in the records that could complicate the case, such as substance use





Time for Open Questions

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Contact us re: SOAR

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