

SOAR Dialogue Highlights 2/21/13

Engaging Your Local Social Security Office

Introductions

Tracy Miller – Cumberland Co. Told us a story of a client who is friends with R. Kelly

Elizabeth Lewin – Iredell Co.

Jackie Bullock – Vance Co.

Charlene Powell – Pitt Co. Told a story of a recent quick approval!

Joyce Allen – Wake Co.

Ariel Reynolds – NCCEH intern and dialogue facilitator

Strategies for Engaging with local SSA Office

Tracy – Discussed the process of building a relationship with a local representative who was initially guarded. Group suggested “killing with kindness.” Tracy continually engaged this worker in conversation and eventually won her over.

Elizabeth – Discussed the process of having a face-to-face meeting with representatives from the local SSA office. In this case, the local SSA office was concerned that the SOAR process would actually slow down the application process for clients. SSA believed that clients should get a denial as quickly as possible in order to move into the appeals process.

- Emily and Elizabeth provided statistics about SOAR approvals and SOAR timelines.
- SSA was initially guarded but got on board when they saw the numbers and began to see how quickly cases were getting approved.
- Elizabeth now reports that the relationship with SSA is mutually supportive, and she is grateful for the help that they provide one another.

Group discussed the possibility of providing trainings at the SSA office surrounding issues of mental health, compounding factors of homelessness, and homeless “addresses.”

- Though trainings were discussed as a possibility, participants expressed some hesitation as they felt as if they themselves are still learning the ins and outs of these issues.

Ariel reminded participants that SSA budgets have been cut – staff shortages and reduced office hours.

- Participants reported an increase in the amount of time for receiving full approvals. More cases seem to be getting reviewed.

Possible Challenges to Engagement

Participants stated that they do *not* often struggle with balancing the role of an advocate with maintaining a working relationship with SSA.

- Elizabeth – suggested that when SSA offers a different opinion, SOAR workers can “play innocent” and ask for clarification. In this way, it prevents SSA representatives from taking a defensive tactic and allows for more fluid conversation to take place.

Group discussed some issues with staff turn-over at local SSA offices.

- Emphasized “killing with kindness”
- Tracy – Going in person to the office to meet the new worker face-to-face and drop off paperwork. Slowly rebuild a relationship/connection.

Joyce – Inquired about the possibility of NCCEH staff and/or SOAR case worker providing a SOAR training/informational session at the regional level of the Social Security Administration in order that SOAR support might trickle down to the local level.

- Ariel – will forward this inquiry to Emily. Also suggested that Joyce and other SOAR workers might take the opportunity to provide a local SOAR informational session at the SSA office (specifically Wake Co.).

Group discussed the steps to take if workers experiences ongoing conflict with local SSA rep.

- Contact local SSA manager to discuss concerns
- If problem not resolved, call Emily for support. Emily can either call the local manager and/or Randy to provide back-up
- Emily is also available to sit with local SOAR worker in a face-to-face meeting with all parties.

Dialogue participants stated that they have *not* had any issues with a client being banned from the SSA office.

- Ariel – encouraged workers to call Emily to determine process of action if this occurs

Other Issues

Discussed ongoing issue of keeping clients engaged when the application process gets lengthy

- Give clients a “cooling off” period.

- Continue calling to check-in on client and encourage them.
- Discussing with client the possible consequences of *not* obtaining benefits

Discussed increasingly lengthy process of approvals

- More cases seem to be going under review, even if they are initially approved.

Joyce – discussed concern that a local SSA worker refused to accept paper files.

- Encouraged to continue regular contact with this worker
- Consider calling worker's manager to ensure that all paperwork is accurate
- Confirm that case is flagged as SOAR

Wrap-Up

Questions to take to Emily:

- 1) Is it possible to conduct a regional training for SSA workers regarding the SOAR process?
 - a. Perhaps talk with Joyce about the possibility of a face-to-face with Wake Co. SSA workers.
- 2) Regarding 2013 SOAR goals: Is it possible to send out some information on how we are doing thus far? (i.e. how many more outcomes are needed in order to reach 125 by March 31st)

Review of 2013 SOAR Goals:

- Number of Applications: 500
- Approval Rate: 85%
- Decision Days: 77 days
- SOAR trainees who complete an application: 75%

Next SOAR Dialogue Call: Thursday, March 31st 10AM