

SOAR Dialogue Highlights

6/20/13

Attendees: Emily Carmody, Aundry Freeman, Cecelia Colson, Jeff Burns, Charlene Powell, TJ Reynolds-Emwanta, Pamalia Davis, Daphne Drew, Jacquetta Bullock, Joyce Allen, Faye Pierce, Elizabeth McDermott

Introductions

- Emily Carmody, NCCEH, Raleigh- SOAR training coming up on June 27-28, 2013 in Chapel Hill
- Aundry Freeman, Cecelia Colson, Pisgah Legal Services, Asheville- averaging 3-4 approvals a month, Donna Gould may be overwhelmed at this time so the cases are taking a little bit more time
- Jeff Burns, Grace House, Hickory- Spoke with Donna and she has 100 cases right now, 5 cases pending right now, 3 more being submitted
- Charlene Powell, ECBH-no new updates, presenting first case next week
- TJ Reynolds-Emwanta, Centerpoint Human Services- Had another approval and several in the process
- Pamalia Davis, Housing for New Hope, Durham- one approval and one denial that we are appealing as a Reconsideration
- Daphne Drew, ECBH- one Reconsideration going through right now
- Jacquetta Bullock, New Direction Ministries, Vance County- 2 new cases and 2 appeals that I'm working on
- Joyce Allen, Alliance of Disability Advocates, Raleigh- 1 case going up for Reconsideration

SOAR Referrals and Evaluating Potential SOAR Applicants

Who is a SOAR applicant?

- Adult who is homeless or at imminent risk of homelessness who may qualify for SSI/SSDI benefits
 - Could have a physical disability or a mental health disability
 - Could have a co-occurring substance use issue or not
- Imminent risk for SOAR is a grey area that is different than HUD's definition
 - Someone who is couch-surfing is at imminent risk of homelessness
 - Someone about to be evicted or in foreclosure is at imminent risk of homelessness
 - Someone who currently has a rental voucher but has no income is at imminent risk of homelessness because of an inability to pay all living expenses and maintain that housing
 - If you are working with someone who receives a housing voucher or is in a permanent housing program, you can still work with them as a SOAR applicant
- Questions:
 - If it is an 18 year old who is living with parents, would they qualify?
 - It depends on the circumstance.

- If the parents are in dire need of benefits to cover treatment and expenses and their housing is at risk due to these costs, then it could qualify.
 - If the parents are relatively financially stable and are not at risk of losing their housing, the application could be put forward as a regular application but not qualify as a SOAR application.
- What if this adult child has never left their parents? If their parents die, they would be at risk.
 - Depends on situation again, and it is important to remember imminent risk in this situation.
 - If the parents are aging and need a plan to quickly get put in place for their child that may qualify as a SOAR case.
 - If parents have a back-up plan and the individual's housing is secure, the application could be put forward as a regular application but not qualify as a SOAR application.
- For people who are in the eviction process or in foreclosure, SSA does not mark people as homeless even with a date that people have to move out. How can we make sure our SSA offices understand "at risk?"
 - In SSA Policy, someone qualifies as homeless if that person doesn't know where they will live at the first of next month.
 - Follow this link to view the policy:
<https://secure.ssa.gov/poms.nsf/lnx/0500835060>
 - If someone is at risk but know where they will live at the first of the month, they may not qualify for the "Homeless Flag."
 - You can still send that case's information to Ann Griffin Hall for reassignment.
 - Many of our "at risk" cases are getting reassigned to Donna now.
 - You would still write SOAR on the 1696, Adult Disability Report

What are the key pieces of information that a SOAR Caseworker needs to decide if they should proceed with an application?

- Ask questions to see if the physical and/or mental health condition is severe enough to meet a listing in the Blue Book that prevents them from earning SGA
 - Make sure that you are respectfully asking these questions
 - Ask questions regarding work history- a flag should be raised if they have not worked in a number of years or have not had a job for long periods of time. May be a sign that something is going on with their functioning and there may be a disabling condition.
 - Because many clients don't describe their disability very clearly or don't know what their disabling condition would be, have a referral form and screening process that looks into work history, military history, housing history, treatment history, and previous disability applications. TJ will share a referral form from the Winston-Salem community.

- Ask for a description of the disability in the client's words on a referral form.
- Ask the referral source about what they feel is the disabling condition.
- If you do run into someone who does not meet a listing:
 - They can always apply on their own if they want to (we can't stop them from doing this).
 - Have a direct conversation about your concerns for their case and not meeting a listing.
 - Have a referral for a jobs program ready.
- Observing their interactions with you during the initial meetings. Can they remember their personal history? Can they describe their disability?
 - How are they functioning in the conversation?
 - Observe body language during meetings.
- Ask questions regarding substance use and treatment history or current treatment for substance use
 - Have referral ready for them for a program if they want it.
 - May be a hard topic to bring up during first meetings.
 - Could ask referral source about substance use and background as well.
 - Remember, the question is if the substance use is material to the disabling condition.
 - Discuss substance use and let them know that they don't have to be sober but you need information about their use because it may be in their medical records.
- Other basics:
 - Are you currently working and earning over SGA? (2013 SGA = \$1,040 in gross income)
 - If they are, their application will be denied.
 - If not, you can go forward.
 - If a person is currently earning SGA and you are not sure how long that job will last, stay in touch with them.
 - Do you have a felony warrant for Escape, Flight, and Flight-Escape?
 - These warrants make someone ineligible to receive benefits while they are still open.
 - Probation and Parole violations don't matter.

How do you prioritize referrals for SOAR applications?

- Have a conversation with the referral agency, the applicant, and see if the case will work for SOAR
 - Make sure there is a face to face meeting
 - First come, first serve basis
- Team leader prioritizes which cases that are assigned to the SOAR caseworker
- Interview everyone who contacts the agency, but prioritize those who are currently homeless
 - Unsheltered individuals are the first priority
 - Those in shelters and programs are the next priority
 - Provide referrals for other agencies and lawyers for those cases that you don't take on

- MCO sets priorities for referrals
 - ECBH prioritizes those individuals involved in the DOJ settlement
 - Centerpoint- focuses on the high cost, high risk consumers who are homeless and rotating through jails, ERs, and hospitals
- Other ways to prioritize:
 - Using a vulnerability index
 - Prioritize individuals based on length of stay in the homeless system

Sample Referral Forms:

- TJ sharing a form from Winston-Salem
- If you have a form that you use, we would love to share that with the group. Email it to Emily at emily@ncceh.org
- NCCEH has a referral form posted on our website:
<http://www.ncceh.org/attachments/contentmanagers/28/IdentifyingSOARApplicants.doc>
 - Basic form but gathers the major pieces of information you may need
 - Also prompts referral agencies as to who makes a good SOAR referral
- NCCEH also has a co-occurring disorder screening tool on our website:
http://www.ncceh.org/attachments/contentmanagers/28/NC%20Co-occurring%20Screening%20Tool_SOAR.doc

If you ever have questions or need to talk through a referral for a SOAR case, feel free to call or email Emily to help evaluate the referral.

Next SOAR Dialogue Call: Thursday, July 18th at 10 AM

You can register for the call by visiting NCCEH's website: <http://ncceh.org/en/cev/703>