

SOAR Dialogue Highlights
9/20/12

Attendees: Emily Carmody, Ariel Reynolds, Tracy Miller, Jackie Bullock, Jennie Thompson, Aundry Freeman, Lilly Moody, Liz McDermott

Introductions/Updates:

- Emily Carmody- Ariel Reynolds has joins us from the UNC School of Social Work as an intern for this year and will be working on a number of projects with us this year
- Tracy Miller- I received my first approval this month
- Jackie Bullock- I had an approval this month.
- Jennie Thompson- We have had 4 approvals this month, will be sending the outcomes soon
- Aundry Freeman- We have had 5 approvals last month
- Lilly Moody- I submitted my first SOAR packet this month and I'm working on my second case.
- Elizabeth McDermott- I had 2 approvals in the last month

Announcements:

- PRA , the national SOAR program, is holding a webinar this afternoon about SSA/DDS relationships
 - Emily will attend and occurs others to as well
 - If there are good examples of improvements to the SOAR process, Emily will pass on to NC SSA/DDS contacts
- Please make sure to provide Emily with any feedback on DDS Examiners
 - Positive or negative comments are welcome
 - Group reported an improved reassignment process where more cases are making it to the SOAR DDS Examiners
 - Feedback that Carrie Henry has been responsive
- Work Incentives Event in Raleigh on October 24-25, 2012
 - In depth review of all SSA work incentive programs
 - Emily will send information about the event to the group

Discussion: SOAR Caseworker In-person Meeting

- It has been suggested several times on SOAR Dialogue Phone calls that there is interest in having a face to face meeting with SOAR Caseworkers
- Today the group will talk about what they would like to accomplish with that meeting and possible agenda items
- What are some things you would like to walk away from the meeting with? What would you like to accomplish at this meeting?
 - Meeting face to face for the first time and being able to network with other caseworkers
 - Tips or support about writing Medical Summary Reports
 - Best Practices
 - Examples

- Any ideas about addressing issues that come up with SOAR cases
 - Identifying barriers in communities
 - Understanding best practices to address these barriers
- Help with interviewing and engaging applicants
 - Help with identifying other issues with applicants that they might not recognize or talk about (ex. mental health)
 - Engaging them in the application process and the paperwork needed to complete an application
- Obtaining input on technical assistance provided by NCCEH
 - Any new tools needed to support SOAR work in the community
 - Feedback about current support and areas for growth
- Contact list for other SOAR caseworkers/referral process
 - It would be great to know who we can refer individuals to in other counties if they move out of our catchment areas
 - Contact list
 - Ariel is currently calling all SOAR trained individuals in the state to see who is completing SOAR cases and if we can list them on the website
 - We could start a list serve for SOAR caseworkers to post on for referrals
- Who should be invited to the meeting?
 - Everyone who is SOAR trained and currently completing SOAR cases
 - There are a number of people who are trained but not actively doing cases
 - Ariel is currently calling SOAR trained individuals to see who is completing SOAR applications
 - NCCEH will use Ariel's list to invite people to the meeting
- Group discussed holding the in-person meeting in November to allow time to get an accurate list of invitees
- Emily asked for volunteers to help lead discussion points
 - MSR Reports- Liz McDermott
 - Barriers- Aundry Freeman
 - Interviewing- Jennie Thompson
 - Input about TA- Ariel and Emily
 - Group stated that they felt comfortable providing feedback about TA with Emily in the room
 - All volunteers will be assisted by Emily
 - Emily will review topics with volunteer discussion leaders before meeting
- Group stated that they would like to invite SSA and DDS representatives to the meeting for lunch
- Liz McDermott has volunteered to organize a space in Durham and lunch for the meeting
- Emily discussed leaving time on either side of the meeting for people who need to drive from longer distances
 - Start at 10 am

- End the meeting around 4 pm
- Group stated that this would be fine

Other Questions for the Group:

- Jennie-
 - How are cases flagged in the ODAR system for expedited hearings?
 - Some of my cases are expedited for a hearing in 3 months but others are not
 - All share a dire need but doesn't seem to be consistent in expediting cases
 - Emily will check with ODAR
 - It is Emily's understanding that the Virtual Review Unit will expedite cases where they feel that DDS has made a mistake in their decision
 - This usually means they feel there is enough evidence for an approval in the file
 - Are there resources explaining what the different mental health diagnoses mean when it comes to symptoms?
 - There is a handout in Module VI that lists medications that treat certain symptoms
 - Emily can find a resource to send to the group
- Jackie-
 - I have had a couple of referrals from people who are in the appeals process
 - I'm not sure what to do in those cases
 - Emily recommends reading the Tips for Pending Cases and Appeals on the website (http://www.ncceh.org/attachments/contentmanagers/28/Tips_for_Pending_Apps_and_Appeals_10-08.pdf) and calling her to follow up with questions after looking it over

Next Call: October 18, 10 AM