

SOAR Dialogue Phone Call

July 21, 2011

(Attendance: Emily Carmody, Katherine Pullicino, Jacquetta Bullock, Grace Maynard, TJ Reynolds-Emwanta, Violet Collins, Kathryn Winston, Mike Hosick)

- I. Introductions and Community Updates-
 - a. Emily Carmody, NCCEH- Went to the SOAR and the National Alliance to End Homelessness Conference last week. Learned a lot from the trainings to bring back to NC.
 - b. Kathryn Winston and Mike Hosick, Triangle Coastal Disability Partners, Wilmington- No new updates. Was able to get an applicant benefits after a year in Cherry Hospital. He was discharged last this month.
 - c. Katherine Pullicino, Onslow-Carteret- I am still working on my first SOAR case. I am waiting on medical records.
 - d. Jacquetta Bullock, New Direction Ministry, Vance County- Just spoke with someone on a possible second case.
 - e. Grace Maynard, Urban Ministry Center, Charlotte- We have had 3 recent presumptive decisions and one win after a presumptive decision.
 - f. TJ Reynolds-Emwanta, PATH, Winston-Salem- Went to the SOAR conference and the NAEH conference. Lots of information to bring back to the community. Have a recent problem of applicants leaving town during the application process. I received first denial, and this particular applicant has been MIA for a month. I eventually found him in jail, but I do not think this impacted the decision. Kind of disappointing, because if he was still in the Winston-Salem area he could take advantage of the relationships that I have formed with attorneys in the area. I may need to connect him with someone in the Raleigh area to help with SOAR.
 - g. Violet Collins, DSS, Pitt County- No updates at this time.

- II. Ethical Question Check In
 - a. Grace- I have an applicant who signed some initial SOAR forms (fax, 1696, etc.) but has since said she does not want to pursue an application.
 - i. She is in need of benefits but do not know how to persuade her to do an application.
 - ii. Not sure if we should pursue benefits on her behalf or wait until she is ready.
 - iii. Kathryn- I just had a guy kick me out of his hospital room this morning.
 1. He was a referral from his nurse at the hospital.
 2. He signed one thing but then kicked me out of the room.
 3. The nurse took some of my forms to see if she can get him to sign the papers.
 4. I can't go against a person's wishes unless there is a guardian appointed.
 - iv. Emily- Kathryn brings up a good point about having someone who has a good relationship to speak to hesitant applicants about completing an application.

- v. Kathryn- I really want to make sure we complete at least a Medicaid application.
 - 1. Those applications require less information than SSI.
 - 2. Do not need as much engagement to get information for the application.
- vi. Emily- That brings up another good strategy of working with people on smaller projects to earn their trust in doing a SOAR application.
- vii. TJ- Has the individual signed anything? Are you the 1696 Representative? Do you have a blanket authorization signed?
 - 1. Grace- I am the 1696
 - 2. Grace- No authorization for medical records is signed
 - 3. TJ- I had one individual who would not sign documents for me but the shelter was going to kick her out.
 - a. I had another case manager who was closer to them get them to sign at least one authorization for me.
 - b. I signed off on some authorizations as her representative to get some information.
 - c. I found some of her family by having her ID to get more information.
 - d. She ended up getting presumptive disability.
- b. Grace- Is it ethical to pursue an application when that individual does not want to?
 - i. TJ- In this particular case, the woman was going to be kicked out of the shelter unless she could show she was working on an application.
 - 1. She is housed today and safe.
 - 2. I'm not sure if she even realizes today that she has benefits.
 - ii. Emily- It is a fine line.
 - 1. For your protection, do not access medical records without someone's knowledge.
 - 2. Guardians can be appointed in cases where individuals are unable to make decisions for themselves.
 - a. Guardians can then sign forms for individuals they represent.
 - b. However, guardians can interfere with the engagement process and you will need the applicant's cooperation to a certain extent.
 - iii. Grace- This particular individual has a friend at the agency that I am helping to get his benefits restored.
 - 1. I am thinking that if she sees me talking to him and helping him, she might be more willing to pursue something.
 - iv. Emily- It often depends on the specific objections that people have to completing an application.
 - 1. Sometimes people do not want to be labeled "disabled."
 - 2. Other times it is paranoia about people finding out information.
 - a. Grace- I think it is a paranoia issue

- b. Emily- That can be a difficult because it is a part of the disease that this person is dealing with.
 - 3. In these situations, Motivational Interviewing can be really helpful.
 - a. Find out their goals for life.
 - b. Then think through together how they can achieve these goals.
 - c. Provide them information about how SSI/SSDI benefits can help with achieving these goals.
 - v. Grace- The other issue is that she used to get benefits but they were terminated.
 - 1. Emily- Have you spoken to the local SSA office about why these were terminated.
 - 2. Grace- The staff was vague, but they hinted that it would not take much to get her benefits turned back on.
 - 3. Grace- We will keep trying to pursue an application with her.
- c. What are people doing to avoid burn out at work?
 - i. Emily- Please be mindful of taking care of yourselves to avoid burn out.
 - ii. Kathryn- We head to the beach when we need a break.

III. Announcements:

- a. SOAR Newsletter went out yesterday
 - i. New 1696 Form from SSA
 - 1. Difference in how you designate that you are not taking a fee
 - 2. The new form is on the NCCEH website
 - ii. Change in the policy about parole and probation violations
 - 1. Recent court decision made it so open parole and probation violations will not affect an application for SSI/SSDI benefits or prevent people from receiving benefits
 - 2. Only legal issues that now impede process are the open felony warrants for escape, flight, flight-escape
- b. NCCEH is working on a doctor outreach document to help SOAR Case Workers
 - i. Addresses issues specific to doctors
 - ii. Want to release this in the next month
 - iii. It will be on NCCEH's website
- c. Outcome Reports
 - i. Please make sure to record as much information for SOAR cases as possible
 - ii. Missing data inhibits NCCEH from having accurate statistics about SOAR cases
 - iii. Specifically- please make sure to fill in the date that someone is housed after a decision has been made

IV. Conference Updates and Reflections from Emily and TJ

- a. Emily- PRA (national SOAR program) will have a Webinar about assisting with the Appeals process

- i. September 13, 2011 at 3 pm
- ii. Register at prainc.com/soar
- iii. Katherine- What if we have attorneys involved in appeals cases?
 - 1. Emily- the best first step is to get a release of information signed and speak to the attorney about how you can help them with the case
 - a. Medical Summary Report
 - b. Provide information
 - 2. Emily- if there is an issue about the attorney not being in contact with the applicant or not being cooperative, please contact me and we can walk through how to deal with the situation
- b. Emily- Systems change and advocacy are relational work
 - i. SOAR is an advocacy program
 - 1. Advocate on behalf of individual applicants
 - 2. Advocate for systems change with SSA and DDS
 - ii. Interpersonal relationships developed by all of us are what is going to bring about systems change
 - 1. SOAR is not going to be able to issue a mandate from the top down for SSA and DDS to work with SOAR applicants in a certain way
 - 2. Change is going to come through our relationships with the local offices and at the state level
- c. Emily- Hospital Collaboration Ideas from Grady Hospital in Atlanta
 - i. SOAR program contracts with the hospital to take a percentage of the Medicaid reimbursement the hospital can claim from SOAR cases
 - ii. Hospital did not need to put any money up front for SOAR case worker positions
 - iii. Seems like a less risky approach for hospitals to collaborate
 - iv. Over two years, SOAR cases at Grady have:
 - 1. Reimbursed the hospital \$1.9 million
 - 2. Reduced ER visits by 24%
 - 3. Reduced inpatient psych visits by 54%
- d. Emily- Reopening previous applications at DDS
 - i. Reopening process in Philadelphia, PA
 - 1. SOAR case workers will file a case and see if that individual has applied before
 - 2. SOAR case workers are able to reopen older cases to get DDS to set an earlier date of onset and approve cases based on older PFD
 - ii. Emily to check with DDS in NC to see if this is a possibility for SOAR cases in NC
- e. Emily- Surveys for SOAR process in NC
 - i. Applicant Survey
 - 1. Exit survey about experience with SOAR
 - a. Changes needed
 - b. What they are able to access now that approved
 - c. What there reflections are on denials

- 2. Will help to get a consumer voice in our program
 - ii. Annual performance reviews of NCCEH and our TA
 - 1. See where we can improve our services
 - 2. Changes in providing TA in the state
 - iii. TJ- would we be doing the survey a few months after the application or immediately afterwards?
 - 1. TJ- it takes some time to get benefits started and people connected
 - 2. Emily- we would need to look at the design of it and how SOAR Case Workers keep track of individuals
 - a. It would be really great to do a short term survey
 - b. In addition maybe an annual follow up survey
 - iv. TJ- This would be a great way to be able to check in with individuals to see how they are doing and how services are going for them
- f. TJ- Benefits Entitlement Service Teams (BEST)
- i. Used in California
 - ii. SOAR case workers are asked to do a lot of work (admin, application, etc.)
 - iii. Going to try to get members of the PATH team take on more of a role in requesting records for referrals
- g. TJ- Other Programs to help with staffing
- i. Vista AmeriCorps volunteers
 - 1. Emily- Vista AmeriCorps volunteers look at systems change
 - 2. Emily- Other AmeriCorps programs let volunteers work directly with individuals in programs
 - 3. Emily- Caution is that all of these volunteer positions are on a rotating basis so volunteers usually leave after a year's service
 - ii. Work First participants
 - 1. Individuals can help with administrative work
 - 2. Faxing records and filing can free up time for more applications
 - iii. Emily- Organizations can also be a part of the Ticket to Work program in their communities
- h. TJ- Systems to use with local SSA offices and DDS
- i. Other communities (Washington, DC) use "Remarks Flag" at local office to type in SOAR
 - ii. Winston-Salem office is meeting with TJ to consider the use of this Remarks Flag
 - iii. This flag can be helpful in identifying SOAR cases at DDS because the homeless status of applicants can change and not be identified by the SSA office
 - iv. Making sure that we are in communication and advocating change to benefit our applicants
 - v. Emily- Will write an email to SSA and DDS
 - 1. Thank them for collaboration
 - 2. Share outcomes
 - 3. Concerns within the system, including flagging

4. Emily to send out reminder to SOAR case workers to email local offices with outcomes and the difference that SOAR has made in people's lives

- V. Goals for the Upcoming SOAR year (July 2011-June 2012)
 - a. Emily- Work to improve SSA and DDS process for SOAR to accommodate the increasing number of SOAR case workers
 - b. Kathryn and Mike- Expand services to include larger medical facilities and mental health providers so that they are aware of the SOAR program
 - i. Had a lunch and learn for providers in the community
 - ii. Has improved referral process
 - iii. We want to have another event to continue educating
 - iv. Funding cuts have provided an opportunity to educate more providers
 - c. Jacquetta- Share information about SOAR to get additional referrals
 - i. Has signed a MOA with DSS to have Work First participants help the agency
 - ii. Will start in September to try to get more referrals
 - d. TJ- Want to help more people with SOAR
 - i. Want to get Baptist Hospital in Winston-Salem to see how they are benefitting from Medicaid and Medicare reimbursements with SOAR and track this data
 - ii. Advocating for more SOAR case workers in the community
 - iii. Try to reduce the amount of time between establishing the PFD and filing the applications
 - e. Grace- Establish a stronger volunteer mental health provider group to do assessments
 - i. Doctors are coming every other Saturday
 - ii. Looking to have psychologists and psychiatrists in addition to medical doctors
 - f. Katherine-Using SOAR as a resource in integrating primary and mental health care
- VI. Next Phone Call, Thursday, August 18, 2011, 10-11 am
 - a. Register for the next call by following this link: <http://ncceh.org/en/cev/480>
 - b. Next call we will discuss outreaching and educating physicians about SOAR and SSI/SSDI