

SOAR Dialogue Phone Call

September 15, 2011

(Attendance: Emily Carmody, Katherine Pullicino, James Davis, John Myklebust, Terri Clark, Aundry Freeman, Jacquetta Bullock)

- I. Introductions and Community Updates-
 - a. Emily Carmody, NCCEH- Still moving along with our state hospitals and SOAR. Just had a SOAR Training for state hospital staff. We are now focusing on holding Documenting Disability Trainings for all doctors within the state hospital and ADATC facilities.
 - b. Jacquetta Bullock, New Direction Ministries, Henderson, NC- No new updates, but I do have a new client that I am starting to work with.
 - c. Terri Clark, PATH, Cumberland County- I had one SSI reinstatement for an individual, but I am applying for SSDI for that individual as well. I have 4 other applications that I am working on right now.
(If you have a reinstatement of benefits, please let Emily know. These will not count as a SOAR outcome, but Emily would like to keep track of these cases.)
 - d. Aundry Freeman, Pisgah Legal Services, Asheville, NC- We had 5 approvals last month. Also helped an individual get benefits reinstated due to a property issue. We are in the process of hiring a SOAR caseworker for Henderson County.
 - e. James Davis, Men's Shelter of Charlotte- I have had 2 approvals and quite a few more cases pending. A group from Charlotte made a trip to Durham, and we are going to start targeting our hospitals as a resource for SOAR.
 - f. Katherine Pullicino, Onslow Carteret LME- We are beginning to work on integrating primary and behavioral healthcare for clients. Looking to establish a network of volunteers and doctors to give free medical care. Looking at developing volunteer SOAR group. We are in the middle of a merger which is complicating hiring new staff to do SOAR cases.
 - g. John Myklebust, Housing for New Hope, Durham-
- II. Announcements:
 - a. Please send Emily your outcomes for the next round of community quarterly reports
 - i. Due to the volume of outcomes being submitted, please do not submit pending outcomes at this time
 - ii. If you have cases where a decision has been reached, please submit completed SOAR Outcome Reports to Emily ASAP
- III. Reviewing the NC SOAR Process
 - a. The group was able to use the join.me website to look at the diagram of the SOAR process attached to these notes
 - b. Review of the process by Emily
 - i. Box 1- Fax the NC Consent for Release form to the local SSA office
 1. Sets the PFD

2. Starts a 60 day clock to get application in to hold PFD
- ii. Box 2- SSA is to fax the form back to the SOAR caseworker with the history of the applicant with SSA
- iii. Box 3- SOAR Caseworkers need to be sure to write SOAR on two forms before turning it into the SSA office
 1. 1696 Representative- on the top line next to your name
 2. Adult Disability Report (online)
 - a. Write SOAR in the contact information with your name
 - b. Write SOAR in the comments section at the end of the form
- iv. Box 4- SOAR Caseworker submit the applications to the SSA office
 1. SSA office needs to scan any evidence or records provided by the SOAR Caseworker into the electronic file
 2. IF THE APPLICANT MEETS THE SSA DEFINITION OF HOMELESS, then SSA needs to give the file the electronic "Homeless" Flag
 - a. This flagging can be confusing
 - b. The applicant must be on the streets, in a shelter, no permanent residence- they get the flag
 - c. Applicants who are in transitional housing programs, in a permanent housing situation do NOT qualify for a "Homeless" Flag
 - i. Cases who do not receive the flag are not eligible for the reassignment process at DDS
 - ii. You may still do SOAR cases for these individuals but they will not be reassigned to the SOAR DDS Examiner
 - iii. You can still write SOAR on the forms for these cases
 - iv. Please still fax Ann Griffin Hall your open cases even if they do not have the "Homeless" Flag
 - d. If your application was not given a "Homeless" Flag but they meet the definition, please let the DDS examiner know that the applicant is homeless and has a dire need
- v. Box 5- Fax a list of full first name, last name, and social security numbers of all of your open SOAR cases that are at DDS on the 1st and 15th of every month
 1. Ann has let me know that not everyone is doing this
 2. It is to the SOAR caseworker's advantage to send Ann this information so she can track the SOAR cases in their system
 3. The best approach is to continue faxing open cases until a decision is made so Ann sees how long it is open in their system
- vi. Box 6- Cases are then randomly assigned to examiners at DDS
- vii. Box 7- DDS Examiners must recognize that the case is a SOAR case within 5 DAYS and put the case up for reassignment at DDS
 1. Examiners are to know that it is a SOAR case because SOAR is written on the Adult Disability Report and the 1696 forms

2. This is a step where some cases fall through the cracks
- viii. Box 8- The case is reassigned to the SOAR DDS Examiners
 1. Initial Cases: Donna Gould, Angela Herron
 2. Reconsiderations: Derrick Martin
- ix. Box 9- SOAR Caseworker works with the DDS examiner to provide any information the examiner may need to make a decision on the case
- c. Issues at different stages
 - i. James- DDS has been telling me that the local SSA office is scanning the 1696 into the electronic file, but they are not checking the box for me to receive mail.
 - ii. John- I am not getting back to the Consent of Release of Information from the local SSA office.
 1. It is like pulling teeth.
 2. It can take about a month with some prodding.
 3. Emily- Having the manager respond to these forms is causing some bottlenecks in getting the form back in Durham.
 4. James- the manager in Charlotte is really good at getting the faxes back to us
 5. Aundry- We have a manager return the SOAR forms in Asheville and it works fine
 - iii. Terri- The person who was the SOAR liaison at our local SSA office got promoted and left the office
 1. When she left, so did the knowledge about how to establish an electronic file with the Consent Form.
 2. Now the office says I have to make an appointment in order to file the 1696 form.
 3. Emily- Other SSA offices are able to use the fax form to establish an electronic file. That file provides for a way for those forms to be "housed."
 4. Terri- I am going to try to call the previous liaison to check with her about how she did it.
 5. Terri- I will also talk to the current liaison to see if she can open a file with the Consent for Release Form.
 - iv. James- We are having issues of the local SSA office not flagging cases as "Homeless" when they meet the definition of homeless
 1. Even though I state this in the application
 - v. Aundry- Derrick needs some assistance with the Recon cases because he is swamped
 1. John- I agree, I have cases with him and have left messages but I am not able to get him to call me back
 2. Emily- I have heard this feedback about Derrick not calling people back
 3. Emily- If these problems persist, please let me know so I can call DDS to address these issues

4. Aundry- He is not returning our phone calls either
- vi. Terri- I have had some issues with DDS examiners changing status on cases and making decisions before they get evidence from me
 1. Emily- It was mentioned on the PRA webinar yesterday that DDS may have a time limit for waiting for new medical evidence
 2. Emily- I will contact DDS to see what that time limit is and let the SOAR caseworkers know
- d. Techniques that are working well with the process
 - i. John- To help with the reassignment, I call as soon as I get the "Howdy" letter in order to tell that examiner that it needs to be reassigned
 - ii. Terri- I write out on the application that the case needs to be reassigned to a SOAR examiner
 1. I put this on the coversheet of my fax to DDS for records
 - iii. Terri- My experience with the ODAR system is much clearer communication and get information from them quickly
 - iv. Emily- Does having a dedicated Claims Rep at local SSA offices help?
 1. John- Durham has a dedicated Claims Rep that works M, T, W only
 2. John- She is handling the application but the manager completes the fax forms
 3. Terri- Not a dedicated Claims Rep, but the manager took an oversight role and was responsive if there were issues
 - v. Aundry- We have had improved flagging of our SOAR cases
 1. Working with and building relationships with Claims Reps in the local office helps in identifying SOAR and what that means
 2. The more we interact with the Claims Rep, the better they are at flagging
 - vi. Emily- Possible Best Practices with SSA-
 1. Local SSA offices need to think about the volume of SOAR cases coming into their office and assign staff that is able to manage the applications in a timely manner
 2. Helpful for the office and SOAR Caseworkers to have one Claims Rep for all SOAR cases
 3. We need to emphasize to the local SSA offices that if applications are not handled correctly, it can prevent the case from being reassigned at DDS.
 - vii. Emily- Possible Best Practices with DDS-
 1. Terri- I call DDS before receiving a "Howdy" letter (within 24 hours-3 days of submitting the case)
 - a. You can call the general DDS number and wait to speak to someone to see if the case has been assigned
 - b. You can also inform that person that the case needs to be reassigned to a SOAR DDS Examiner

- e. Suggestions for changes to the process
 - i. Terri- It would be great to have DDS and SSA provide clearer timelines and guidelines
 - 1. Timelines that they have for completing cases so we know how long we have
 - 2. Guidelines to how we can interact with the DDS Examiners and work as a team
 - 3. SOAR caseworkers need to be seen as a resource because we can save DDS and SSA a lot of money and time on cases if they work with us
 - 4. Aundry- I agree, the more contact we have with DDS the better we can assist them with the cases
 - a. Donna is wonderful with letting us know what she needs
 - b. Other examiners do not communicate what they need or just do not call us back
 - ii. Emily- Including the SOAR cases without the homeless flag in the reassignment process
 - 1. This way all SOAR cases have access to the SOAR DDS Examiners
 - 2. This could benefit people working with individuals in transitional housing or those in permanent supportive housing
 - 3. This can also eliminate a lot of confusion in the field as well
 - 4. John- I am concerned about burdening the Examiners if we widen the criteria
 - a. Emily- that is a legitimate concern
 - b. Emily- it would be a good idea for me to bring the numbers of how many additional cases this would mean for the examiners
 - iii. Emily- TJ emailed a suggestion that the SSA office use a "Remarks" Flag to write the word SOAR on the electronic file
 - 1. Examiners would not have to dig through the file to see SOAR written on the forms
 - 2. Katherine- Is it reasonable to think that local SSA offices would do that?
 - a. Emily- It would take education from SOAR caseworkers to make sure that Claims Reps are putting the Remarks flags on the files
 - b. Emily- The question is if this is worth your time
 - 3. Jacquetta- I think anything that would help in identifying SOAR cases would be helpful
 - 4. Terri- Would this mean that cases would not get a "Homeless" flag
 - a. Emily- Cases that qualify for the "Homeless" flag should be flagged (whether they are a SOAR case or not)
 - b. Emily- The "Remarks" flag would be in addition to the "Homeless" flag that should be on the case
 - iv. Terri- It would be great for us to have a list of issues that Ann Griffin Hall can help the SOAR Caseworkers with while the case is at DDS

- v. Please email Emily at emily@ncceh.org , if you have other suggestions about improving the SOAR process

IV. Next Phone Call, Thursday, October 20, 2011, 10-11 am

- a. Register for the next call by following this link: <http://ncceh.org/en/cev/509>
- b. Next call we will discuss the recent webinar from PRA about Reconsiderations and Appeals