

SOAR Dialogue Phone Call Notes
December 16, 2010

Attendance: Emily Carmody, Elizabeth Lumley, Spencer Cook, Violet Collins, Kendra Norville, Loretta Tillman, Aundry Freeman, Terri Clark, Ali Abdullah (visitor)

- I. Introductions and SOAR New Year Resolutions
 - a. Emily Carmody, NCCEH- To develop more dedicated SOAR caseworker positions in NC
 - b. Violet Collins, Pitt County DSS- More approvals next year
 - c. Elizabeth Lumley, LATCH- Work to reduce approval time by working with SSA to get cases to DDS quickly
 - d. Loretta Tillman, Charlotte- To get Charlotte on the map, and get the SOAR program moving in the area
 - e. Terri Clark, Cumberland County Mental Health- Focusing on community awareness and collaboration with the new SOAR program
 - f. Kendra Norville- Improve relationship with SSA and DDS to get more approvals
 - g. Spencer Cook- 100% approval rate and have more accountability at local SSA office

- II. Work Incentives Presentation (Elizabeth Lumley)
 - a. Work Incentive Information Summit- Highly recommend to all SOAR Caseworkers
 - i. Gain a better understanding of programs for SSI/SSDI
 - ii. Able to provide more information to applicants
 - iii. Emily to email PowerPoint presentations from training
 - b. Ann Griffin Hall- gave presentation about how DDS makes decisions on cases
 - i. Do not need to review
 - ii. Same as SOAR training explains process
 - c. SSI Work Incentives
 - i. Can continue to receive SSI and go back to work
 - ii. Exclusions for SSI
 1. General exclusion- \$20
 2. Earned Income exclusion- \$65
 3. Formula
 - a. $\$1000 - \$20 - \$65 = \$915 / 2 = \$457.50$ Countable Income
 - b. $\$674 - \$457.50 = \$216.50$ in SSI benefits
 - c. Total Income= \$1,216.50
 - iii. Students regularly attending school
 1. SSA does not count the first \$1640 of earned income
 2. This amount will not count against their SSI income
 - iv. Impairment related work expenses
 1. SSA can provide funding for equipment to go back to work
 2. Amount for equipment is excluded
 - v. Blind

1. Earn more income than other disabled individuals
2. Unsure of exact amount
- vi. Medicaid (1619B)
 1. Can continue benefits with work
 2. As long as they continue to meet criteria:
 - a. Income
 - b. Disability
- d. SSDI
 - i. Ticket to Work Program
 1. Trial Work Periods
 - a. 9 month period where individuals can go back to work without income affecting benefits
 - b. Does not need to be consecutive months to count
 - c. 9 months need to be counted in a rolling 60 month period
 - d. Any wages under \$720 or 80 hours of work are not counted
 - i. Earns \$715= not a trial work period
 - e. Medicare
 - i. Can continue their Medicare benefits for 7.75 years
 - ii. Individuals will need to pay for coverage
 - e. PASS (Plan to Achieve Self Support)
 1. SSA helps individuals develop a plan to go back to work by setting goals
 2. Individuals continue to receive benefits while participating in program
 3. Emily to email Work Plan Form that SSA uses
 4. Can set additional money into a savings account
 - a. It does not count against them for resources
 - b. Must use money to achieve work goals
 - f. Stressed getting individuals back to work
 1. Reviews of cases
 - a. Not dependent on work
 - b. Time between reviews depends on disability that they are awarded benefits for
 - g. Vocational Rehab presented about their program but Greenville specific
 - h. SOAR Caseworkers can educate service providers and applicants about being able to work with benefits
 - i. Emphasis of benefits as a means for recovery
 - ii.
- III. Collaboration with State Hospitals
 - a. Workshop this winter with discharge planners, social workers, LME staff for State Hospitals
 - b. Referrals from State Hospital

- i. Proposal for SOAR Caseworkers to travel to state hospitals to meet with individuals from their specific area who are possible SOAR cases
 - ii. Is anyone interested in starting this collaboration process?
 - 1. Terri Clark
 - 2. Violet Collins
 - 3. Elizabeth Lumley
 - 4. Kendra Norville
 - 5. Loretta Tillman
 - 6. Aundry Freeman
- c. Possible training for state hospitals about how to strengthen their records
 - i. Suggestions on ways to improve records from state hospitals
 - 1. Stress way they document
 - a. "Fine" and "stable" - in hospital setting
 - b. Including predictions for community setting
 - 2. Improve legibility of records
 - 3. Functioning information is left off of records
 - a. Liz Lumley recommends handing out a cheat sheet for functioning information that doctors can use
 - b. Liz Lumley recommends also passing out a sample letter of support
 - 4. Check list for referrals from social workers and doctors to SOAR Caseworkers
 - 5. Uniformity of records amongst hospitals
 - d. Opportunity for Collaboration through Department of Justice investigation of DHHS
 - i. SOAR can provide benefits for better discharging
 - ii. Focus initially on high utilizers
 - e. If you are interested in attending the workshops at the hospitals, email Emily (Emily@ncceh.org) and the date and times for your area will be provided

IV. Other Issues or Questions

- a. Elizabeth Lumley-
 - i. Difficulty with local SSA office in Durham in getting applications processed and sent to DDS
 - ii. Recent case submitted Oct. 25th did not get sent to DDS until Dec. 8th
 - iii. Lack of response- Phone calls not returned, emails not answered
 - iv. Emily- Set up a meeting in January to discuss these issues with the office
 - 1. Possibly set up a designated Claims Rep. for SOAR cases
 - 2. Designated CR was discussed in September with Durham office but not done
 - 3. Greenville office has designated CR at SSA office-
 - a. Violet and Kendra say that this is useful for communication
 - b. Nicole Hall is the dedicated SOAR CR

- c. Not sure how long they have had that
 - d. Still slow with responses but better communication
 - b. DDS Updates
 - i. Emily provided DDS with list of SOAR caseworker names in order to improve their ability to recognize SOAR cases
 - ii. FYI- if you know your case has been submitted to DDS but you have not received a letter from an examiner in a week and a half, then you can call the general DDS phone number to learn who the examiner is
 - iii. Reminder to write "SOAR" on 1696, Adult Disability Report, and SSDI application
 - c. Pitt County is linking SOAR with HPRP program
 - i. HPRP can provide deposits for rent and utilities once approved for benefits
 - ii. Allows individuals to not have to spend all of their money on setting up housing
 - iii. Partnership is working well in Pitt County
 - iv. Emily- check with your HPRP program in your county to see if your applicants would be good referrals for your area's programs
 - v. Contact Emily for contact information for HPRP programs in your area
- V. Next call, January 20th at 10 am

Happy Holidays and a Happy New Year!