

SOAR Dialogue Phone Call
9/16/10

I. Roll Call-

- a. Aundry Freeman, Asheville- Cecelia received her first favorable SOAR decision
- b. Spencer Cook, Durham- Received first approval on a case and has several new, good cases
- c. Liz Lumley, Durham- Received two approvals yesterday, had a meeting with Rep. Price's office who offered help with improving the system and finding additional money for more SOAR Caseworker positions in the community
- d. Linda Mandell, Pitt County- Working with an individual who is literally homeless and was able to get her connected to resources such as food stamps, an ID, and medical appointments, she is legally blind and hard of hearing
- e. Kathryn Winston, Mike Hosick, Wilmington- Kathryn received an approval yesterday on the first case she started working on with SOAR
- f. Also on the call- Dan Ferrell, Wilmington
- g. Emily Carmody NCCEH-
 - i. Reminded everyone to send in their outcomes so that their hard work can be recorded
 - ii. New outcomes to report
 - 1. Over \$600,000 in taxable income brought in to NC in the past 3 months (back pay, annual SSI, annual SSDI awards)
 - 2. If the group knows SOAR workers who are not sending in outcomes to NCCEH, please remind them to do so

II. Potential Changes to Outcome Form

- a. Review changes as sent out
 - i. New Outcome form sent out with call announcement

- ii. Everyone was able to look at the changes
- b. Do these questions capture the data we need and is it too much of a burden to answer additional questions?
 - i. Question as to if case was given a Homeless Flag by SSA
 1. Purpose: to remind people to ask SSA/DDS office to flag the case if applicant is literally homeless, make sure flags go on cases
 2. Aundry- How would we know if they put flag on the case?
 - a. Emily- While submitting an application to SSA, let the office know that they meet the SSA definition of homelessness and the case needs a flag
 - b. Emily- Checking with DDS to make sure the office put a Homeless Flag on the case
 3. Aundry- May be a little difficult to capture
 - a. Best to talk to DDS to see if flagged
 - b. Not sure local SSA would be able to handle answering this question
 4. Spencer- Does not feel like it would be a problem to track
 5. Kathryn- Not sure want all cases flagged
 - a. DDS is pushing these cases really quickly because they are priority
 - b. DDS is pushing to get evidence in, especially on Reconsiderations
 - c. Want a quick decision, but want the right decision
 - d. Better at initial application vs. reconsideration
 6. Emily- Advantages to receiving Homeless Flag
 - a. If the applicant is homeless, make sure that SSA and DDS realizes this
 - b. Case is able to be reassigned to a SOAR DDS Examiner that knows what a SOAR cases mean in terms of evidence

7. Kathryn- Important to speak to every DDS Examiner with every case whether SOAR Examiner or not
 - a. Be careful at reconsideration level because they want to decide these cases
 - b. Examiners have been helpful- provided Kathryn with evidence that she did not have
 8. Emily- It is important to speak to DDS examiners as emphasized by SOAR training
 9. Liz- Will not be that hard to track, means a simple phone call to ask if case is flagged or not
 - 10.Emily- This does not take the place of notifying Ann Griffin Hall about cases that are sent to DDS
 - a. This flag is important to new DDS system
 - b. Aundry in Asheville had some concerns with local SSA office flagging cases
 - c. Hoping this question will allow Caseworkers to track flagging of cases better
 - 11.Aundry- Did have concerns because only 4 cases have been flagged out of whole list submitted to Ann Griffin Hall
 - a. Still speak to all DDS examiners
 - b. Like to let examiners know that the applicant is homeless because this may explain why they have inconsistent medical records
 - 12.Emily- Will put this on the new outcome form and look for feedback from SOAR caseworkers to see if this is a viable outcome to track
 - 13.Group agrees to this change
- ii. Question that asks if case was reassigned to SOAR DDS Examiner
1. Purpose: to see how many cases are reassigned to designated examiners

2. SOAR DDS Examiner's names are Marsha Golden and Derrick Martin
 - a. Only two examiners that are SOAR DDS Examiners
 - b. Only cases that will be reassigned:
 - i. Applicant has to be literally homeless and have a SOAR flag on the case
 - ii. Case needs to be identified as SOAR case 1696 and Adult Disability form within first five days at DDS
3. Linda- if it goes to a different examiner, then will it drag through the system?
 - a. Emily- If it gets assigned to another examiner, the case will be decided at it was before by DDS
 - i. Case can still be decided quickly
 - ii. Based on the strength of the evidence you present
 - iii. SOAR Examiners have been trained about SOAR and what to expect with SOAR cases
 - b. Linda- Recent case was assigned to someone who I do not know
 - i. Taking my applicants to the SSA office and telling them this is a SOAR case
 - ii. Still not getting reassigned
 - iii. Emily- New outcome report can then show DDS when cases are not reassigned
4. Does this capture data?
 - a. Emily- This information will help NCCEH to track how many cases are being reassigned
 - b. Would need to know names of examiners to know if the case has been reassigned
5. Is it too much of a burden?
 - a. Linda- not too much of a burden but frustrated cases are not being reassigned

- b. Kathryn- Why do we want cases to be reassigned?
 - i. There are good examiners at DDS
 - ii. Impossible to reassign all of our cases
- c. Emily- SOAR DDS Examiners have been shown to be beneficial in other states because caseworkers are able to develop better relationships with these examiners
 - i. Best practice from other states and reduces decision time
 - ii. Examiners are trained in SOAR process
- d. Kathryn- Worried about Examiners being overburdened
 - i. Educate your examiner on SOAR
 - ii. Disagree with just 2 examiners handling cases
- e. Emily-
 - i. DDS provided SOAR with Marsha and Derrick so not a judgment on other examiners
 - ii. Trying to reduce decision time on cases to meet national average

6. Group agrees that this outcome would be good to track

- c. Emily will start to send community outcomes to SOAR Caseworkers on a quarterly basis along with the SOAR newsletter
 - i. Group feels it would be beneficial for advocating for SOAR program in their community
 - ii. Emily- SOAR Caseworkers can also look to see if NCCEH is receiving all the outcomes for their community
 - iii. Emily-If SOAR Caseworkers know of others doing SOAR who are not submitting outcomes:
 - 1. Encourage these SOAR workers to submit outcomes
 - 2. Encourage these SOAR workers to contact NCCEH about the work they have been doing

III. What is a SOAR Case?

a. Who is a SOAR applicant?

- i. Aundry- Applicant is homeless, low education level
- ii. Linda- Disabled enough not to be able to work, incapable of holding a job
- iii. Aundry- Disability has to be prominent with enough medical information available
- iv. Dan-
 1. Initially SOAR needed clear cut mental illness, over the years this has expanded to involve physical disabilities
 2. Applicant needs to meet definition of disability
 3. Homeless or at risk of homelessness
- v. Linda-
 1. Is someone in a transitional housing program considered homeless for a SOAR applicant?
 2. Emily-
 - a. PRA states that a SOAR applicant can be homeless or at imminent risk of homelessness
 - b. Up to caseworkers to determine this
 - c. SOAR and SSA do not have same definition of homelessness
 - d. Transitional Housing still implies a risk of homelessness because the housing is not permanent

b. What is the difference between SOAR and Disability Advocacy?

i. Mike-

1. Advocacy- Cases that are pretty clear cut that do not need as much development besides presenting medical records
2. SOAR- Cases are those that need more development including a medical summary report and more detailed research

- ii. Kathryn-
 - 1. Agrees that it is a lack of medical documentation
 - 2. Medical Summary Report is there to increase documentation
- iii. Aundry-
 - 1. Even in a SOAR case, become an advocate for client
 - 2. Some Caseworkers do not have choice in who they can take as a SOAR case
 - 3. Pisgah advocates for all homeless applicants whether they will get approved at "SOAR" level or not
 - 4. SOAR level means a favorable decision in a short amount of time vs. those who do not meet a listing
- iv. Spencer-
 - 1. Consider the need for speed, getting a decision as quickly as possible
 - 2. Prioritize those people who's conditions are more complex and need the benefits more quickly
- v. Mike-
 - 1. Interesting situation in determining if case is SOAR case
 - 2. Philippine couple who had American-born, 18 year old son with Schizophrenia
 - a. Couple had to return to the Philippines
 - b. Prepared to "hang around" until he received benefits
 - c. Once he received benefits, put into group home and left country
 - d. He would not have been able to navigate this system
 - e. Decided it was a SOAR case because deserved the attention SOAR would give it
 - f. Aundry agrees case was SOAR case
- vi. Does group feel that SOAR cases receive more attention?
 - 1. Aundry agrees

2. Mike agrees
 3. Kathryn agrees
- vii. Liz-
1. SOAR is for homeless and those who are at risk of homelessness
 - a. Imminent eviction
 - b. Not paying rent
 2. Cases that she does not report as SOAR are those that meet the exact criteria listing that are going to be a shoe-in
 3. Some cases that are not as clear-cut but only need medical records will count as SOAR
- viii. Are SOAR Caseworkers handling non-SOAR and SOAR cases the same way?
1. Aundry- Has been using same process, but is going to meet with work group to see about not using same initial fax for non-SOAR cases
 2. Mike- If not a SOAR case , he sends in Form 3288 which establishes protective filing date and request disk to be burnt with any information the SSA office has
- ix. Emily-
1. SOAR applicant is someone who is homeless or at-risk of homelessness
 - a. Eviction, unable to pay rent
 - b. Anyone not in permanent housing
 2. SOAR allows cases to receive more attention
 3. Critical components are:
 - a. 1696 form signed
 - b. Gathering medical evidence
 - c. Writing a medical summary report that includes functioning report

4. If anyone ever has a case for which they are unsure about using the SOAR process, please call Emily to discuss
 5. Still a SOAR case even if DDS does not reassign case to SOAR designated examiner or if the case cannot receive a Homeless Flag
 - a. Emily available to talk with SSA office about the SOAR program
 - b. Can help to clarify program definitions for SSA office
- x. Spencer- Is a SOAR case still a SOAR case at the appeals hearing level?
1. Emily- Will send out tips for appeals with follow-up email
 - a. Still submitting Medical Summary Report as evidence in case
 - b. Helping applicant to retain attorney if needed
 - c. PRA does not collect decisions in the appeals process for their outcomes by NCCEH does
 2. Dan- Our program only handles applications in initial decisions and reconsiderations because they are DDS decisions
 - a. Emily- Program by program decision as to how you will limit cases
 - b. Emily- Every program receives funding in different ways which may limit the cases they are able to take on
 3. Aundry- If we refer someone to a private attorney to handle the hearing, we can keep up with that client?
 - a. Emily- Yes
 - b. Spencer- Even if attorney becomes primary representative?
 - c. Emily- Yes

- d. Dan- May add a number of days to decision time
- e. Emily- Had previous experience with attorneys able to advocate for an expedited trial
- f. Dan- Caseworkers may also request a reopening of the record to have DDS review new evidence
- c. SOAR definitions are an ongoing discussion
 - i. Please call Emily with questions
 - ii. Post questions to dialogue discussion area
 - 1. Able to pose questions to group
 - 2. Group is able to respond to those questions

IV. Reminder: Medical Record Information

- a. Thank you to Durham, Asheville, and Kendra Norville in Pitt County for submitting information
- b. Still putting together database with hospitals, LMEs, and clinics across the state
- c. Please send information in any format that you have
- d. Will be posted on NCCEH website, SOAR Caseworker password protected pages

V. Next Call: October 21, 2010 10 am