

SOAR Dialogue Highlights

8/21/17

Attendees: Emily Carmody, Diamond Jenkins-Nelson, Pamalia Davis, Elizabeth Lewin,

Introductions

- Emily Carmody, NCCEH, Raleigh- Next SOAR training will be September 14-15th in Raleigh
- Diamond Jenkins, Southlight, Raleigh- 10 cases pending, 4 approvals last month, slow month for decisions
- Elizabeth Lewin, Fifth Street Ministries, Statesville- lots of clients and a great approval that was done within a week this month
- Pamalia Davis, Housing for New Hope, Durham- No update this month

SOAR Applications and Substance Use

Background: Applicants who have a history of substance use or are currently using are still able to be approved for SSI/SSDI benefits. The challenge is showing DDS that the substance use is NOT material to the disabling condition. This means that if the substance use stopped, a disabling condition would still exist for the applicant that would prevent them from earning SGA. SOAR caseworkers need to show how the substance use is NOT material in the applicant's Medical Summary Report (MSR). Below are highlights of a discussion with SOAR caseworkers about substance use and SOAR applications.

Tips for SOAR Cases with Substance Use

- Look through medical records for reports about remission of substance use and continued symptoms of disabling conditions to highlight in the MSR
 - Often electronic medical records carry over diagnoses of substance use when the person is actually in remission
- If you are unable to determine if a substance use issue is material or not then it is important to engage the applicant in thinking about temporary sobriety or recovery
 - Conversation with applicant emphasizes honesty about use with SOAR caseworker to strengthen application
 - Offer AA or referral for treatment
 - Not everyone needs to have sobriety- there are some cases that are so apparent that it is clear if the person stopped using the disabling condition would continue
 - Have this conversation about substance use before establishing protective filing date in case they choose to go into treatment for a period of time
 - If the person goes into treatment and you are not able to meet the 60 day deadline to submit the application from the established protective filing date, call SSA to let them know
- How do you know when to go forward with a case even with active substance use?
 - If client's behavior implicates functioning issues and symptoms are apparent

- Records from youth show issues before substance use began
- History of head injury
- Apparent thought disorder and inability to follow conversation
- If physical health has been so compromised by use that even if they stop it will still be a factor
- Drug of choice effects do not mirror symptoms of the disability
- Is there a particular way to note it in the MSR?
 - Look at medical records for remission and highlighting it
 - Make sure to state substance use is immaterial to the claimant's disabling condition
 - Minimizing or trying to hide substance use never works
 - Emphasize records from youth or early symptoms before substance use
 - Find out why using drugs in the first place and see if it is to manage disabling condition
- Other tips:
 - Don't be afraid of talking about substance use in the MSR or try to minimize it because you will lose credibility with DDS
 - Sometimes you have to wait until you can prove it is not material
 - Having discussion and plan for stress of process and potential for relapse and increase use
 - Payee conversations can be challenging but necessary
 - Maintain good boundaries with applicants and know you can't control their behaviors

Next SOAR Dialogue Call will be on September 21st at 10 AM:

<http://www.ncceh.org/events/1187/>