

## SOAR Dialogue Phone Call

March 17, 2011

(Attendance: Emily Carmody, TJ Reynolds-Emwanta, Aundry Freeman, James Davis, Kendra Norville, Kathryn Winston, Mike Hosick, Terri Clark, Spencer Cook, Grace Maynard)

- I. Introductions and Community Updates-
  - a. Emily Carmody, NCCEH- Finished presentations at the state hospitals and working within the state hospital system about using SOAR to improve discharges
  - b. TJ Reynolds-Emwanta, PATH, Winston-Salem- several new clients this month, 2 approvals in the last week, one approval in less than 2 weeks
  - c. Aundry Freeman, Pisgah Legal, Asheville- 5 new clients this month, presumptive approval with full approval within 2 weeks on one case
  - d. James Davis, Men's Shelter of Charlotte, Charlotte- Still working on a case getting medical information and IQ testing for the applicant
  - e. Kendra Norville, DSS, Pitt County- recently got a presumptive approval within 2 weeks, recent Project Homeless Connect in Greenville provided new referrals
  - f. Kathryn Winston, Coastal Disability Partners, Wilmington- 4 wins in the last week, working on a case where the applicant has been hospitalized at Cherry Hospital for 12 months- DDS denied initial application, hospital will not discharge without benefits, filing reconsideration, questions about substance abuse despite having been sober in the hospital for over 8 months
  - g. Terri Clark, PATH, Cumberland County- working on 4 cases, just got a referral that may be a presumptive disability case, collaboration process with the local hospital is going well, hospital likes the referral form I created and we are creating a process flow chart for the hospital
  - h. Spencer Cook, PATH, Durham- Elizabeth Lumley and I did presentation to local SSA office for the Claims Reps, well-received and has made a noticeable difference in processing cases and getting them to DDS faster, looking at providing presentations annually for local SSA office
  - i. Grace Maynard, Urban Ministry Center, Charlotte- started 6 weeks ago, working with 4 people now, volunteers will be working with a couple of other individuals as well
  
- II. Announcements:
  - a. Electronic Records Express (ERE):
    - i. Recent national SOAR webinar had a presentation from SSA on the ERE program
    - ii. [www.socialsecurity.gov](http://www.socialsecurity.gov) has a page and walk-through of the program available
    - iii. Allows SOAR Case Workers to electronically upload files/records into applicant's DDS electronic file
    - iv. Takes the place of faxing paper records to DDS or turning the records into SSA
    - v. Works best if you have a scanner in your office to convert paper files into PDF files
    - vi. Reduces use of paper and faster way to get confirmation that records are in files

- vii. Aundry- I have been using this for a year now and it is wonderful
  1. Hospital gives CD of records
  2. All you have to do is download the CD on the computer and then upload onto the website
- viii. The contact at DDS for the ERE program is Ann Griffin Hall
  1. Please contact her to get a username for the program
  2. Ann can also answer questions regarding the program
- b. Upcoming National SOAR Conference
  - i. July 2011, Washington, DC through PRA
  - ii. Conference will focus mainly on community collaborations
    1. Workshops will focus on collaborating with systems
    2. Other topics will be quality assurance and training issues
  - iii. 110 slots available, 50 slots will be taken by SOAR state leads
    1. After registration is open, it will be first come, first serve for these slots
    2. Once registration opens, contact Emily Carmody because PRA will want SOAR state lead approval to register
  - iv. Fees for training
    1. PRA is not charging registration fee
    2. Attendees will need to pay for their travel and hotel
    3. Currently, training is at Fairmount Hotel
  - v. PRA will send out email once registration opens
    1. Emily will forward this email to the group
    2. Please contact Emily with any questions

### III. Issues in the state

- a. Aundry- Had a concerning Medicaid hearing
  - i. Recently went to Medicaid hearing where individual was denied because individual did not call DDS after receiving a letter
  - ii. Client is homeless and did not call DDS
  - iii. Hearing was focused on the phone call issue
  - iv. Aundry was not the representative when the initial letter was sent out
  - v. Outcome of the hearing:
    1. Will let Aundry know in two weeks
    2. Hearing officer kept repeating that the applicant could always reapply
  - vi. No one in the group has had a similar experience at this time
- b. Emily- Great use of the Dialogue group to check to see if concerning incidents are part of a pattern across the state

### IV. Presentation on Presumptive Disability (PD) by TJ Reynolds-Emwanta

- a. TJ has been able to advocate for a number of PD decisions in her SOAR work
- b. Please see attached presentation outline for content of presentation
- c. Q and A

- i. Terri- I have a referral that has an active claim, started process before working with me, client has had 6 strokes since filing the application- can I go back and negotiate a PD for this applicant after the fact?
  - 1. TJ- since stroke is a PD listing, I would definitely ask for a PD decision
  - 2. TJ- explain current living situation, financial needs, medical needs
  - 3. TJ- If you have a MSR on file for the case, add a page to update current medical state
  - 4. TJ- make sure DDS has the most current records to show stroke history
- ii. Aundry- when do you put your request in for PD and to whom?
  - 1. TJ- I inform SSA when submitting application to give them a heads up about the possibility of a need for a payee
  - 2. TJ- I put in the request with DDS examiner
    - a. Tell them about the claimant (medical history, current living situation)
    - b. Point DDS Examiner towards MSR that I submitted
  - 3. TJ- always good to communicate with DDS examiner about other difficulties
    - a. If the person is currently in the hospital
    - b. If you are having trouble linking applicant to appropriate level of care (ACT Team) due to lack of benefits
    - c. DDS Examiner can use third party ADL evidence to show functioning issues
- iii. TJ- PD has really helped our applicants in getting housed because they can prove income and access more housing programs
- iv. Emily- In listening to the presentation, the three keys are:
  - 1. Efficiently reviewing records and writing reports
  - 2. Writing good medical summaries with doctors' supports
  - 3. Clear communication and advocacy with DDS
- v. Aundry- when do you submit outcomes for PD?
  - 1. Emily-Submit an outcome for the PD decision
  - 2. Emily-Submit a finalized outcome with the official decision
    - a. Note the new payment information in this outcome form
    - b. Emily will update outcomes in the database
- vi. Spencer- would you ask for PD for individuals who do not have a psychotic disorder? (i.e. Major Depressive Disorder, Bipolar Disorder)
  - 1. TJ- I have been trying to request it in every case, especially if they have more than one listing
  - 2. TJ- I would especially ask for PD in cases that involve:
    - a. Two listings from the blue book (ex. Diabetes and Depression)
    - b. HIV cases- usually takes their T-cell counts fluctuating
    - c. Several Strokes- even if drug related

- d. Individuals who are frequent patients in mental health facilities for long periods of time
  - e. Severe mental health issues
  - f. Individuals who are in and out of jail due to mental health issues or banned from shelters
3. TJ- school records can also expose that there are underlying issues since childhood
  4. Kendra- got first PD by accessing school records to show needs from childhood
  5. Emily- it never hurts to ask for PD

V. Quality Review Issues

- a. Emily- please state in the comments of your outcome reports if your cases are pulled for quality review
  - i. Please note whether it is an internal DDS quality review or at the regional level
  - ii. Regional level of review takes a longer time to complete
- b. Emily- NCCEH wants to be able to track if there is an emphasis on SOAR cases for quality reviews

VI. Next Phone Call, Friday, April 22<sup>nd</sup>, 10-11 am

- a. Kristin Lupfer will be on the call to discuss Hospital Collaborations
- b. PRA just released a new toolkit about collaborations with hospitals
  - i. Good examples of collaborations from various states
  - ii. Example of MOU that you can create with hospital

VII. Future Topics

- a. Please contact Emily if you have any ideas for discussion topics
- b. Please contact Emily if you would like to present to the group about a topic