

STL Updates / Reminders

- New DDS examiners, emailed list out & on secure webpage <https://www.ncceh.org/nc-soar/>
- Submit active provider survey asap
<https://app.smartsheet.com/b/form/d133ca70dd6b45a394b36d63b3a2d67d>

SSA Updates / Reminders

- Working on getting training out to FOs in next few weeks – 2 phases
 - Phase 1: A reminder explaining the SOAR process
 - How to handle calls, where to look for 1696
 - Phase 2: Meet with all SOAR liaisons at FOs to review what job responsibilities are and how to handle them
 - Thinking about doing this regularly throughout the year, especially considering turnover

SOAR Questions for SSA

1. Have they spoken to the manager/supervisor of the Raleigh Field Office yet to address the numerous delays in assigning 1696's to claims and the significant delays of cases making it from SSA over to DDS?
 - a. Yes. Working closely with Raleigh FO to address issues. Over 300 1696s missing – not just SOAR. Larger FO so lots to address. Hoping with training coming up we can see a difference in getting 1696 to DDS in a timely fashion. Lot of new hires at Raleigh FO – new hires have to have someone review what they do. Some cases will sit there when they shouldn't – if you submit an app and it's been long enough that it should be at DDS try to reach out to SOAR liaisons – if those go unresponsive pass it to Adriana for her to bring it Emily. The goal is to get claims to DDS in 21 days – smaller offices able to do so, larger offices not so much.
2. We're interested in knowing what steps have been taken to resolve the issues we mentioned at the annual meeting. Chris stated that he'd be checking in with SSA Supervisors regarding them misplacing the SSA 1696 forms - has he? Has he been successful?
 - a. Sent out reminders to offices they were made aware of with issues. The list of missing 1696s Adriana compiles is sent to the FOs, if you notice anything is taking too long reach out to Adriana.
3. Could SSA train their reps or at least inform ALL SSA Reps on SOAR as a part of their orientation? This would make a huge difference!
 - a. Emily can look into orientation and suggest adding it. Reminders about SOAR go to everyone in FO as well and include step by step instructions.
4. Where are we in submission preference? Are phone appointments to apply for benefits still preferred?
 - a. SSA encourages online – more efficient. For paper applications those are scanned into online repository so it takes longer.
5. Can you all please reiterate what forms are allowed to be faxed in?

- a. Refer to PowerPoint
6. How should we handle instances when SSA Reps refuse to provide award notice info, or info pertaining to case? Even when we provide clients' birth info and there's an SSA-1696 on file?
 - a. Appointed representation ends after 60 days. Reminders going out will include instructions for technicians to correctly place award letters so reps are getting those notifications
 7. Since TERI cases aren't always common can they discuss the TERI process and what they look for in medical records?
 - a. Refer to PowerPoint
 8. Could they send responses to clients and their representative at the same time?
 - a. Yes, that should be happening already
 9. If they could send a letter to case worker once client start receiving a check?
 - a. Award and denial letters go to both client and representative
 10. Could we please start again to get a client's electronic file requested via the SSA-3288?
 - a. SSA offices are still doing so
 - b. Typically, 14-day period to get answer on 3288
 - c. Can let office know if you prefer email or CD record
 - d. Emily will inquire about workflow and address lack of response w/ Raleigh FO
 11. Why do SSI/SSDI examiners contact me as needed for client information as I am listed as their AR, but the Medicaid unit workers only try to call the clients?
 - a. Probably a question for DDS
 12. Are SOAR workers able to register as representatives through ssa.gov to gain access to electronic folders and to receive denial notices and other important information about our client's cases? If so, do you recommend this method over faxing 3288s?
 - a. Emily will circle back and see if this is an option
 13. In the past, Raleigh SSA would give SOAR Reps preaddressed/metered envelopes for SSA, are those still available?
 - a. Emily will look into that to see if it can still be offered