

## SOAR Dialogue Phone Call

January 19, 2012

(Attendance: TJ Emwanta, James Davis, Moli Jones, Dazara Ware, Linda Mandell, Sheila Crump, Jackie Bullock, Violet Collins, Linda Mandell, Dianna Polland)

- I. Introductions and Community Updates-
  - a. TJ Emwanta, PATH Program, Winston-Salem- Educating mental health community about SOAR and giving updates which is going well, Had one approval and one denial this month that will be handing over to attorney in collaboration
  - b. Sheila Crump, Men's Shelter of Charlotte, Charlotte- No updates for this month
  - c. James Davis, Men's Shelter of Charlotte, Charlotte- No updates for this month
  - d. Jackie Bullock, New Directions Ministries, Henderson- No updates
  - e. Violet Collins, Pitt County DSS- One approval in January
  - f. Moli Jones, Freedom House, Roxboro- New to the call this month
  - g. Linda Mandell, Pitt County Planning, Greenville- One approval in December and no denials
  - h. Dianna Polland, Pisgah Legal Services, Hendersonville- First two cases at DDS awaiting decision, not assigned to dedicated SOAR Examiners but spoke with Ann Griffin Hall about how to advocate to get cases reassigned
  
- II. Announcements:
  - a. SOAR Training in Hickory
    - i. February 29<sup>th</sup>-March 1<sup>st</sup>
    - ii. Please refer anyone who is interested [www.ncceh.org](http://www.ncceh.org) to complete an application
  - b. SSA has passed a policy that makes it possible to ban individuals from their offices
    - i. Can be banned up to 2-3 years
    - ii. Has potential to be punitive
    - iii. Emily is working with national advocacy group to get this revised or reversed
    - iv. If anyone's clients are banned, please find out the circumstances and contact Emily.
    - v. TJ- one thing to keep in mind that the SSA office is a federal building that have certain rules
      1. Make sure applicants don't have weapons, etc.
      2. Threats, verbal threats
    - vi. Emily to send email with more information on this new policy.
  
- III. Ethical Questions/Check In
  - a. None reported
  
- IV. Achievements of 2011
  - a. James Davis- SSA dictated that an applicant have a payee who was awarded benefits

- i. Was able to get a letter from a doctor to state that the applicant can manage his own funds
    - ii. TJ- Definitely a big achievement to be able to advocate for applicants when it comes to payee
      - 1. Remember SSA 787 is the form to use to get a payee designated or to designate the applicant as the payee
      - 2. Can be a good idea to carry copies of this form with you
  - b. Linda Mandell- Have developed good relationships with organizations in the community
    - i. Last year I started a good relationship with PORT Human Services
      - 1. Have been very helpful in signing Medical Summary Reports
    - ii. Worked with Nurse who supervises Emergency Department Caseworkers
      - 1. Very helpful in obtaining a doctor's signature from ICU
      - 2. Without her help I don't think I could have reached the doctor
    - iii. TJ- Building relationships is key
      - 1. Using "people skills" to improve work with agencies
      - 2. Can lead to more cooperation with signatures
  - c. TJ Emwanta- Developing relationships in the community with key agencies
    - i. Scheduling SOAR presentations of mental health providers to educate frontline staff
      - 1. Was able to get a clinical supervisor to the presentation
      - 2. Clinical supervisor saw how SOAR was different from "business as usual"
      - 3. Clinical supervisor now instructs doctors to sign reports
    - ii. Key is to target people within agencies with connections to doctors to sign reports

V. Setting Goals for 2012

- a. Goal setting allows us to:
  - i. Think ahead
  - ii. Motivates us
  - iii. Helps us to organize time and resources
  - iv. Allows us to track our goals and progress
- b. Found a tool that helps to set "SMART" goals:
  - i. Specific
  - ii. Measurable
  - iii. Attainable
  - iv. Relevant
  - v. Trackable
- c. Examples provided by Emily
  - i. Develop relationship with local provider or hospital
  - ii. Work towards Certification
  - iii. Build a stronger community group to advocate for SOAR
- d. TJ- I want to become a Certified Disability Worker.

- i. Found a certificate program through online course with Cornell University
  - ii. Currently working to accomplish this
- e. James- I would like to get my SOAR Certification in 2012.
  - i. TJ- SOAR Certification requires you to do a certain number of cases
    - 1. Checklists, Medical Summary Reports, etc.
    - 2. 6 cases total
    - 3. Exams, self-assessment exam online
    - 4. Moli- Is there a timeline requirement?
      - a. James- no timeline on Certification outline
      - b. Moli- I may be getting mixed with something else
  - ii. TJ- All you have to do is go to the NCCEH website for more information
    - 1. Information under "SOAR Certification"
    - 2. Do not have to be doing SOAR cases for a certain amount of time
    - 3. Total of 6 cases needed
- f. Sheila- I would like to get the three cases I have in process approved and learn what I can do better in the process.
  - i. TJ- very true that the more cases you do the more confident you are
  - ii. Sheila- I don't want to stop and give up on this.
  - iii. TJ- Can be tough when you have other case management tasks needed.
  - iv. Sheila- I need to make time to do SOAR applications
    - 1. Dedicate a day or certain hours to work on applications.
    - 2. TJ- great to have a big picture goal and then smaller goals beneath that.
    - 3. TJ- SOAR requires time so it would be great to have some set aside to complete applications
- g. Dianna- I am extremely excited about this job because of tracking outcomes and results.
  - i. I just started in December with 7 referrals.
  - ii. My challenge this year is trying to collaborate and to do better outreach to get more referrals.
  - iii. I have done a number of presentations and meeting with clinical directors with local agencies with no change in referrals.
  - iv. Would be great to collaborate with a local health provider to get referrals.
  - v. Other goals: Certification, getting more doctors on board, etc.
  - vi. Linda- Do you have a Continuum of Care?
    - 1. Dianna- I think so.
    - 2. Linda- We have monthly meetings in my area
      - a. Can be a great way to reach a lot of homeless service providers
      - b. Good referral source, depending on what agencies are there
    - 3. Dianna- That's a good idea.
  - vii. Dianna- I was at a Mental Health Roundtable Meeting this morning
    - 1. They also provided more resources I could tap into
    - 2. Goodwill, churches, etc.
  - viii. Dianna- I've found some challenges within outreach in a rural community.

- ix. Linda- Local police can be very helpful.
  - 1. Dianna- good idea, that was brought up today too
  - 2. Dianna- I got a contact for someone at the local jail to follow up
- x. TJ- The Point In Time Count is happening next week
  - 1. Could provide a way to outreach in the community
  - 2. Our outreach team finds a number of people to refer during the count and by going out into the community.
- xi. TJ- You will be surprised with the number of referrals you will start to get.
- h. Linda- Win some more cases.
  - i. I've become more judicious about the cases that I continue.
    - 1. Developing a better sense about who to pursue SOAR cases with.
    - 2. In doing that, I've improved my track record
  - ii. TJ- Prioritizing SOAR cases can be hard
  - iii. Dazara- Just wanted to remind everyone that PRA is holding a webinar next Wednesday afternoon to help identify possible SOAR applicants
    - 1. Go to [www.prainc/soar.com](http://www.prainc/soar.com)
    - 2. Instructions on the website to sign up
  - iv. TJ- Emily will review these webinars with us a lot of times
  - v. Moli- I can't go to the webinar, is there a way to get that information afterwards?
    - 1. Dazara- Slides will be posted on the PRA website
- i. Jackie- Reach out to other shelters in the area for referrals.
  - i. I only got one referral from a shelter.
  - ii. Working with the CoC as well.
  - iii. Going to set up a meeting with the men's shelter.
  - iv. Have had some difficulty in Vance County/rural community
  - v. Dazara- Are there any PATH teams in rural areas?
    - 1. TJ- There are some including Statesville, NC
    - 2. TJ- I'm not sure of others.
    - 3. TJ- There are some changes that have been going on with the PATH program in NC.
      - a. Many of them are based in metropolitan areas
      - b. Emily would be a better resource for answers
  - vi. TJ- Rural Area Ideas
    - 1. Churches do a lot of outreach
    - 2. Police-
      - a. We actually go to the squad meetings to talk
      - b. Participate in training police officers about mental health issues
    - 3. Libraries could also be a good resource
  - vii. TJ- I can suggest this as a topic for another Dialogue Call.
- j. Violet- We are not getting referrals from the hospital that we are anticipating.
  - i. TJ- sounds similar to Dianna and Jackie.

- k. Moli- My primary goal is to get started.
  - i. I work for a mental health agency in Person County
  - ii. Some issues of timing in the number of hours to complete cases that are not billable for these applications.
  - iii. The ultimate benefit of the client getting benefits is attractive, but still working out how to complete these applications.
  - iv. I have gotten several referrals from the case management team.
  - v. I've determined 3 to be "good" referrals so far.
  - vi. One question I have is if a client has been denied and in an appeal. Are they still a candidate for SOAR?
    - 1. Linda- one thing to check is if they have an attorney
    - 2. Linda- If not, you can at any point become their 1696 Representative to help out
    - 3. Linda- If they do have an attorney,
      - a. You can't be a 1696 Representative
      - b. They can transfer from an attorney but may still be some charges from the attorney for the work already done
    - 4. TJ- SOAR really focuses on the initial application
      - a. Appeals can be more challenging because you are picking up the case in mid-stream
      - b. Have to jump in really quick to make 60 day deadlines for Reconsideration and Appeals
        - i. Not a lot of time to gather medical records and write reports
        - ii. Cases are also expedited because applicants are homeless
  - vii. TJ- Keep in mind that Medicaid benefits will be awarded back to the PFD.
    - 1. Your employer could look at billing Medicaid retroactively for services.
    - 2. Moli- I am pushing that point for sure.

- VI. PRA is holding a webinar next Wednesday, January 25<sup>th</sup>
  - a. You can register at PRA website ([www.prainc/soar.com](http://www.prainc/soar.com))
  - b. PRA will post slides on their website following the webinar

- VII. Next Phone Call, Thursday, February 16th, 10-11 am
  - a. Register for the next call by following this link: <http://www.ncceh.org/en/cev/547>