

SOAR Dialogue Phone Call Notes

June 17, 2010

Attendance: Violet Collins, Spencer Cook, Aundry Freeman, Becky Kenion, Elizabeth Lumley, Linda Mandell, Kendra Norville, Jamie Reid

- I. Check In:
 - a. Name, where you are, thing that surprises you the most about SOAR

- II. DDS Process Updates
 - a. 3 new examiners on board for SOAR
 - i. Two main examiners will be Marsha Golden and Derrick Martin
 - ii. Cases will still be initially assigned to random examiners
 - iii. The initial examiner will need to be able to see that it is a SOAR case and request the case be reassigned
 - iv. Reassignment must come within the first 5 days
 - b. Need to be able to identify SOAR cases quickly so they can be reassigned to SOAR examiners
 - i. Two things caseworkers can do:
 1. 1696-
 - a. In top section (“I designate_____”) put your name and SOAR case manager
 - b. Kristin from PRA also suggested putting “SOAR” at the top of the 1696 form
 2. 3368 (Adult Disability Report)-
 - a. In the Contacts Section- list yourself as a SOAR Case manager
 - b. Put SOAR in the remarks section
 - ii. Another process DDS and NCCEH are working on:
 1. Faxes being sent to Ann Griffin Hall at DDS twice a month with a summary of the people you have submitted cases for
 - a. Fax would include full name and full SSN
 - b. Have to do fax instead of email because of full names/SSN
 - c. Working with DDS to try to streamline this process
 - i. Designate 2 days for everyone to send faxes
 - ii. Develop a fax form
 - d. HOPEFULLY- once cases are designated better then we won’t have to do faxes
 2. I will keep you all posted as this gets developed
 - c. Two other requests from DDS:
 - i. Submit all medical evidence that you have
 1. DDS is concerned that SOAR Caseworkers are withholding information

2. Caseworkers expressed concerns that there have been times when the local SSA office has not sent in all the evidence they submitted
 3. Caseworkers stated that they send in all the records that they can get
 4. Aundry has had 3 cases that have been denied and the letter did not list all the medical evidence she submitted
 - a. Aundry emailed Ann Griffin Hall to see why the evidence was not used
 - b. Ann is reviewing the cases currently
 - ii. Need to include more information about relationship with doctor in the MSR:
 1. The options for categories of relationships are: treating source, interview, 1 time exam
 2. DDS is requesting that a sentence be stated in the conclusion that explains the relationship
 3. Many SOAR Caseworkers already include this information and find that the medical evidence backs up this relationship
 4. Many SOAR Caseworkers also include contact information of the doctors
- III. How are local SSA offices doing
- a. Local offices are not returning faxes in a timely manner
 - i. Durham, Forsyth, Wilmington, and Buncombe not getting faxes back
 - ii. Pitt County is getting faxes back within 24 hours
 - b. Local offices are not filing all of the paperwork turned in
 - i. 1696 forms are being filed
 - ii. Not all medical evidence is being turned over to DDS
 - c. Lack of Communication
 - i. Durham's office changed phone numbers, not being able to reach claims reps
 - ii. Wilmington has had challenges with communication
 - iii. Emily to send out a list of contact information provided by state SSA
 1. Please check to make sure the information is correct
 2. Send corrections back to Emily
 - d. NCCEH to see how they can best address these issues since they are statewide and major challenges to the SOAR process
- IV. Open it up to challenging cases that people need help with
- a. Violet had a case where a man was denied SSI and SSDI because he was receiving unemployment (\$400 per week)
 - i. Question of whether Unemployment can be counted towards SGA
 - ii. Emily to clarify how unemployment affects SSI/SSDI cases and email it to the group
- V. Any questions /Concerns/Announcements
- a. Spencer asked a question about the ethics of withholding Substance Abuse records
 - i. Group concurred that SA records can be a barrier to receiving benefits
 - ii. Group agreed that it is not ethical to withhold records

- iii. Group offered suggestions about how to address SA in medical summary reports
 - iv. Violet stated that different DDS workers look at SA differently
 - 1. Frustrating to see two people with the same condition with SA get different decisions
 - 2. With designated examiners this will hopefully change
 - b. Announcements:
 - i. Benefit Bank- thebenefitbank.com
 - 1. A way for people to see if they qualify for benefits (food stamps, TANF, Medicaid) – can do self serve or be named a site with a trained counselor who walks through the process
 - 2. Individuals leave with a completed form and a list of all the items they need to bring to DSS
 - 3. Recruiting community organizations to be Benefit Bank Sites- counselor would be a subsidized employment opportunity for 4 months for parent with child under 18
 - 4. Contact them for further information
 - ii. Reminder that there will be a SOAR training in Winston-Salem on July 21-22
 - iii. Many SOAR caseworkers could be Certified SOAR Caseworkers
 - 1. Please check out the certification process on NCCEH's website
 - 2. If you have questions, please contact Emily
 - 3. It would be great to say that we have over 10 dedicated AND certified SOAR Caseworkers in NC
 - iv. An idea about starting up a SOAR blog for ongoing dialogue was purposed
 - 1. Emily will look into how NCCEH can set this up
 - 2. Emily will keep the group posted
- VI. Next call: July 15th at 10 am.