

## **SOAR Dialogue Highlights**

### **7/18/13**

Attendees: Emily Carmody, Pamalia Davis, Tracy Miller, Mike Disieno, Jeff Burns, TJ Reynolds-Emwanta, Jacquetta Bullock, Aundry Freeman, Cecelia Colson

#### **Introductions and Updates**

- Emily Carmody, NCCEH, Raleigh- getting ready to go to DC for the National Alliance to End Homelessness Conference next week
- Pamalia Davis, Housing for New Hope, Durham- 2 new cases from the new team at Housing for New Hope
- Tracy Miller, Cumberland County, Fayetteville- 1 approval, 1 denial that I am submitting for an appeal
- Mike Disieno, Eastpointe MCO- my first SOAR dialogue call, 1 approval and working on 1 Reconsideration case
- Jeff Burns, Grace House, Hickory- 2 approvals with one getting 18 months of back pay, 3 pending cases, 2 cases submitting to the offices and starting on 3 cases
- TJ Reynolds-Emwanta, Centerpoint Human Services MCO- 1 final approval, 1 presumptive disability case and 4 cases about to be filed
- Jacquetta Bullock, New Direction Ministries, Vance County- took over appeal case that was denied, working on 3 SOAR Medical Summary Reports
- Aundry Freeman, Cecelia Colson, Pisgah Legal Services, Asheville- submitted 3 outcome reports this month

#### **Feedback from the Field:**

**SSA has a new policy where you need two forms of ID for a Social Security Card. Has this caused problems in the field? This should not affect SSI/SSDI applications. Has it interfered with your applications?**

- TJ- Have run into this on one occasion. Would not accept older ID with old address. He was homeless, and they kept asking for bills, which he didn't have. Right now, he was approved for benefits, has an updated ID, and still does not have a Social Security card.
- Pamalia- Have run into this, but because we have a letter from Housing for New Hope and the shelter, we are able to get birth certificate and get their ID. Has not been a real issue to date.
- Jeff- We also have a letter and an understanding with the DMV that people with the Grace House letter can get a free ID with our agency's address.
- If you run into any new issues around this policy, please contact Emily at [emily@ncceh.org](mailto:emily@ncceh.org) to let her know; so she can relay this information to the US Interagency Council on Homelessness at the Federal level.

#### **SOAR Medical Summary Reports and Medical Records**

**Background:**

- Medical information and the Medical Summary Report is the heart of any SOAR application.
- In order to qualify for SSI/SSDI benefits, they must have a medical diagnosis that impairs their ability to earn SGA for 12 months.
- Medical Records are helpful with:
  - Diagnoses made by physicians or PhD psychologists
  - Duration- how long have they been receiving treatment, how long disability has been impairing functioning
  - Specific symptoms that are found in the Blue Book Listings
- Medical Summary Reports are helpful because:
  - They fill in the gaps of medical records
  - The people we work with often get transient or emergency healthcare which does not provide a full picture for DDS

### **Questions/Topics to Cover:**

How do you get the doctors involved in signing off on Medical Summary Reports?

- Best practice for Medical Summary Reports is to have the MSR co-signed by a doctor so it is medical evidence.
- Donna Gould at DDS wants us to send the MSR report even if you have tried and can't get a doctor to sign off on the report.
- What are SOAR caseworkers doing to help doctors to sign off on the report?
  - TJ- I make myself available to doctors to discuss the MSR and show them the records that I have cited. Once you have done several reports, they don't really need to see the records because trust is established.
  - TJ- Now that I'm with the MCO in our area, we are targeting directors of agencies to explain why they need to participate in SOAR.
  - TJ- Also important to show them the Blue Book Listing and how that is different from their diagnostic manuals.
  - Emily- Try to discuss the report or the application with the doctor before you have the MSR complete so you aren't meeting them for the first time and asking them for their signature.
- How else do you develop trust with a doctor?
  - TJ- I usually go with an applicant to an appointment early on to explain my relationship and that allows them to ask me about any insights I have while working with them.
  - Pamalia- I go to appointments with consumers, and we also have a nurse on staff who has been a great help with a lot of our consumers. Recently, I've been able to get into contact with doctors and nurses. Things are getting a lot better than when I started.
  - Tracy- I always try to make a doctor appointment with the applicant to let them know what we are doing and reporting any issues with medications. Working with some of the doctors, but one of them is still a work in progress.
  - Emily- Engaging doctors is a big part of the process:
    - Listen to the unique concerns that the doctor may have.

- Do not assume that they know about the SSA application process. They do not receive training about benefits in school.
  - Doctors have many myths about the process that we address in our Physician Outreach Tool:  
[http://www.ncceh.org/media/files/page/Physician\\_Role\\_document.pdf](http://www.ncceh.org/media/files/page/Physician_Role_document.pdf)
- Other concerns that doctors may have:
  - Pamalia- I had a doctor who was leery about signing because he supported an application for someone who got money and got into trouble with that money.
    - Emily- A concern that SOAR caseworkers have as well, and these are benefits that people are eligible for or have paid into the system to be eligible for.
    - Emily- One topic to bring up is the payee process and how a doctor's opinion can impact SSA setting up a payee.

#### Fees for Medical Records, especially from larger companies like Healthport

- Has anyone else run into companies, hospitals, or agencies charging fees for records?
  - Group- Yes
  - Jeff- I thought that I would have a charge with Duke Hospital but because we were a nonprofit agency, we got the record at no charge. I had to wait a little longer for the records but they were free.
  - Emily- Many Medical Records Departments assume that you are an attorney or that an attorney who is taking a fee is involved since you are working on a benefits application. It is important to explain who you are and that you are not taking a fee for this case.
- Other tips from the group:
  - Mike- If I can't pay the fee for those records I let DDS request them.
    - Emily- you do run the risk of not knowing about information that is in the records that could complicate the case, such as substance use.
  - TJ- I altered my release of information form and cover page to explain who I was, what the information would be used for, who Centerpoint is, and that we are not taking a fee for the case. I can share this with the group.
- Tracy- Major barrier with Healthport (\$2300 bill) that was reversed after several conversations with people at the company. Providers who used Healthport didn't seem to help.
  - TJ- we are an MCO too (local government) and we didn't have any issues with Healthport.
  - Emily- Tracy maybe looking at TJ's wording explaining the MCO's role may help with Healthport in the future.
  - Emily- As a group, we can check in about medical record providers to see if there are issues across the state. I can check in with what we can do at a state level about that.
- Emily- Keep in mind that we have a Medical Records Database on our website that you all can use and contribute to: <http://www.ncceh.org/files/3171/>

**Next SOAR Dialogue Call: Thursday, August 15<sup>th</sup> at 10 AM**

**You can register for the call by visiting NCCEH's website: <http://www.ncceh.org/events/668/>**