

## **SOAR Dialogue Highlights**

### **1/16/14**

Attendees: Emily Carmody, Tracy Miller, Daphne Drew, TJ Reynolds- Emwanta, Elizabeth Lewin, Pamalia Davis, Joyce Allen

#### **Introductions and Updates**

- Emily Carmody, NCCEH, Raleigh- Getting ready for maternity leave and getting plans in place
- Tracy Miller, Cumberland County – Had a denial and we are going to appeal it
- Daphne Drew, ECBH MCO- Got a letter from SSA re: an application, hoping to hear about decision
- TJ Reynolds-Emwanta, CenterPoint Human Services MCO- Have had several approvals in the last couple of months
- Elizabeth Lewin, PATH team, Iredell County- Two approvals in the past couple of weeks and working on new cases

#### **Announcements**

- Partners Behavioral Health MCO is currently looking to contract with SOAR caseworkers in their catchment area to do cases. If you know of anyone who may be interested in doing this, please contact Emily at [emily@ncceh.org](mailto:emily@ncceh.org).
- SOAR Writing Circles-
  - This idea came from the November meeting
  - A way to get peer-to-peer feedback about Medical Summary Reports
  - Be on the lookout for an introductory email for these circles
- Emily's Maternity Leave-
  - Schedule-
    - Baby is due February 18<sup>th</sup>, Emily will be working until baby arrives
    - Will most likely return to the office the week of May 5<sup>th</sup>
  - Support-
    - You can continue to call our office for support
    - For emails, please email [soar@ncceh.org](mailto:soar@ncceh.org)
    - Please continue to send SOAR Outcomes
    - SOAR Dialogue Calls will continue to happen in February, March and April
      - February 20<sup>th</sup>- Elizabeth Lewin will discuss burnout for SOAR caseworkers
      - March 20<sup>th</sup>- Elizabeth McDermott will discuss documenting work history in Medical Summary Reports
      - April 17<sup>th</sup>- TJ Reynolds-Emwanta will lead the call with a TBD topic to discuss
  - Trainings-
    - Our next two-day training will be in May 2014 in the Triangle area

- If and when the national SOAR program releases their online training, instructions for the online training will be posted on our website

### **Engagement with SOAR Applicants**

- Challenges faced in the field:
  - Meeting with clients starts off well but applicants disappear once the application process slows down
    - At first, a big buy-in in getting benefits
    - People tend to leave after the application is submitted and waiting to hear back
  - People drop out throughout the process
    - Applicants get excited but it does not happen right away
    - Often don't understand you can't see them everyday
    - Applicants get frustrated with process
  - Meeting individuals who could be helped by SOAR but they don't recognize their disability (mental health issues) and don't want to go forward with the application (will be discussed on a later call)
  - Issues around discharge from hospitals and/or jails
    - Lose applicants once discharged
    - Individuals may resurface months later
    - Jails- will transfer people to other counties for other charges
    - Individuals discharged on a different date than caseworkers told by staff
- Tips/Strategies for challenges:
  - Engaging people during the application process
    - SOAR is not an immediate process and helping people in crisis
      - Crisis creates an need for immediate help/control
        - May file without you to get something "done"
        - May grow impatient with timeline and process
      - Homeless service system may create more frustrations for people so they may have less trust in your services
    - Working with applicants who have functioning issues
      - May have Concentration, Persistence and Pace issues so have problems with remembering/following instructions
      - ADLs- may have problems making it to appointments
    - Tip: Emphasize partnership and encourage applicant to help them help you
      - Working as a partnership is necessary to get the application done
      - Ways to emphasize partnership:
        - Make phone calls with applicant in the room to have them see what you are doing on their behalf
        - Emphasize at the beginning of the application process that they are in the driver's seat of the application process

- Give applicants an assignment in between meetings so they have something to work on and be responsible for and let them know what you are doing between now and the next meeting
    - Write down work history/treatment history
    - Make a list of who else we could talk to for the report
  - Bring the whole file with you when you meet
    - Shows them all the medical records you have gathered and the work you have done
    - Validates for them that their visits have been documented and their input has produced something
- Tip: Word of mouth is a powerful engagement tool
  - Under-promise/Over-deliver
  - If you say what you do and do what you say, you can build up a good street reputation which will pay off with future applicants.
- Engaging during the waiting period (after application has been turned in)
  - Tip: Discuss with the applicant how they want to be kept in touch with (email, phone, in person) and how often
    - Contact them weekly, daily, etc.
    - Shows them that you care about them and your following up on what you said you would do
  - Tip: Tell them to contact and update you with every new treatment appointment and/or hospitalization
    - Can get new records to DDS
    - Let the applicant know that it could help their application
- Engagement challenges with discharges from hospitals and jails
  - Often very challenging
    - Discharge plans change and people leave before you can get to them
    - People not contacting after discharge
    - Best laid plans change when applicants get out and priorities shift
  - Tip: Look at their follow up plan that is usually documented by the hospital/jail
    - Try to intersect with the applicant at these appointments
    - Can be challenging because a lot of people don't show up for these follow up appointments
  - Tip: Let agency staff (provider, shelter, etc.) know that you are looking for someone and they will help keep a lookout for them
    - Building bridges in the community with unlikely sources: library staff, gas station employees
    - Create relationships with hospital staff as well
  - Tip: Discussing discharge plan multiple times with someone before they leave the jail/hospital

- Tip: Give business card in a sandwich bag so it has a chance of surviving and they will have your information
- Tip: Get information about their normal hangouts- may not be related at all to homeless services
- Tip: Get a contact person that you can call to find them
- Keep in mind:
  - We can't control applicants' actions.
  - Applicants are making decisions based on what will help them to survive. SOAR may drop as a priority for them based on what is going on.
  - SOAR caseworkers need to engage applicants so that they see you as a vital resource and a way out of their situation.

**SOAR Dialogue Calls will continue in February, March and April.**

**You can register for the calls by visiting NCCEH's Calendar of Events.**

**February 20<sup>th</sup>:** <http://www.ncceh.org/events/729/>

**March 20<sup>th</sup>:** <http://www.ncceh.org/events/730/>

**April 17<sup>th</sup>:** <http://www.ncceh.org/events/732/>