

## **SOAR Dialogue Highlights 3/20/14**

**Attendees:** Joyce Allen, Jaquetta Bullock, Candice Chilton, Pamalia Davis, TJ Emwanta, Randy Glazier, Elizabeth Lewin, Liz McDermott, Tracy Miller, Charlene Powell, Corey Root

### **Introductions and Updates:**

- Liz and Candice – Candice is on board for LATCH and working on first MSR
- Pamalia – 2 approvals and 2 pending
- Jaquetta – just taken on a new case
- Elizabeth – 1 approval, 3-4 pending
- Tracy – 2 approvals, 1 denials because did not go to CE
- TJ – 1 approval, 1 presumptive approval
- Randy Glazier – doing volunteer work, looking at a new case
- Joyce Allen – 1 pending
- Candice – averaging 3 approvals per month

## **Documenting Work History**

### **Common problems**

The population cannot remember where they worked, name of company or salary, unsure of dates of employment

One client had 32 different jobs in 2 years – hard to show this in one document

Clients do not have a resume

### **Tips to jog clients' memories**

Start with present, go backwards

Clients can get frustrated – if so, give them space

Caseworkers can fill in the little information they have in the narrative sections

If client cannot remember, just document this in the application

File application online, when call in to touch base with SSA can often flesh out this section together

Works well if you have good relationship with SSA

Let client know that this is just to the best of his/her recollection – this will be stated in application

Caseworker will start with work history very early in SOAR process

Client can start thinking about jobs they have had – at the very beginning, at first session

Then go over work history again at every meeting

Clients come with more and more info, clarifying details

Also let clients know that can change application info as go through the process, it's not set in stone, helps to build relationship

Relate to client – it is hard to remember where you worked, how much you made 15 years ago

Can find job history info in medical records – use this info to jog memories

### **Getting information from SSA**

SSA will allow you to request an exhibit CD – give you earnings history, which gives caseworker more info to jog clients' memory

Also can use CE info to client's advantage

Or get print out from SSA, very helpful to use this to jog memories

### **How use work history in MSR**

Can be problematic because hard to get a work history, but also not sure how work history should relate to this

When get info about a job, talk about what they did and what they are no longer able to do

Talk about if fired for cause, relate it to disabling condition

Or if quitting job, can also be a symptom of mental illness (co-workers trying to poison client, client picking fights with employers)

Use occupational information website – (info from TJ)

<http://www.occupationalinfo.org/> and <http://www.bls.gov/ooh/a-z-index.htm>

Or the NC Minimum Wage Rate History Chart:

[http://www.nclabor.com/wh/fact%20sheets/minimum\\_wage\\_rate\\_history\\_072407.pdf](http://www.nclabor.com/wh/fact%20sheets/minimum_wage_rate_history_072407.pdf)

### **Nontraditional work**

Caseworkers on the call do typically include temp labor in application information but do not include under the table work

This type of work is very common, could be embarrassing for client to include

“Tell me the types of jobs that you have paid taxes on” to distinguish between all work and the work SSA will have on file

### **Completing the work history form**

Client is so depressed is not motivated to complete or talk about this form, cannot even get out of bed  
Caseworkers can fill the form rather than asking client to complete

Can consult family members who could help – client may be disenfranchised

Give clients space when they refuse to discuss issues

Donna will ask for separate work history report if do not have that info in MSR

TJ turns work history form in along with other docs so that DDS/SSA does not send out mailings

Sends with the function report, use ACT team members to fill this

Then sends in forms ahead of schedule

Helps to get presumptive disability approvals

### **Case conferencing**

Client who worked on a work release program – “on the coast” not sure of name of jail

Send release to NC Dept of Corrections, Donna Upchurch phone: (919) 715-1584 fax: (919) 715-1581– very helpful to work with, sends back info very quickly

Indicate that you want mental health records, have client initial this request

Working with “advocates” who don’t use MSR until application is denied and they go before the judge; trying to get the person denied?

Clients calling attorneys out of state also problematic

Client incarcerated for all his adult life (27 years), out briefly and was receiving SSI, then back in jail and benefits suspended

Brief work history, diagnosed with paranoid schizophrenia

Not much info to go on, was denied because of lack of info

Requested exhibit CD, went before with a lawyer and was denied

Get jail records; use jail history to advantage (cannot adapt outside of jail); Talk about how life in prison easier in MSR

Client with depression and paranoid schizophrenia – improved as a result of volunteering in kitchen of shelter; psychiatrist noted this work behavior and its beneficial effect in the report

Did he need supports in order to continue working there? Yes – note this in MSR

Client has self-isolated, no relationships but found solace because could be alone

Note that work environments are like the shelter (quiet) does not translate to regular work environment

Use his own words to talk about why he was in the kitchen

This is not paid work– not considered work; chores are regularly required at shelters in order to stay there

**Next SOAR Dialogue Call:** Thursday, April 17 at 10:00. Register at <http://www.ncceh.org/events/732/>.

The topic will be reconsiderations and appeals; anyone with suggestions for discussion points can send them to TJ Reynolds- Emwanta at [tjemwanta@cphs.org](mailto:tjemwanta@cphs.org).