

SOAR Dialogue Highlights

8/20/14

Attendees: Emily Carmody, Charlene Powell, Jacquetta Bullock, Tracy Miller, Pamalia Davis, Aundry Freeman, Liz McDermott

Introductions and Updates

- Emily Carmody, NCCEH, Raleigh- SOAR training next week and working on annual report for the NC SOAR program
- Charlene Powell, ECBH MCO- 1 case denied this month
- Jacquetta Bullock, New Direction Ministries, Vance County- 1 approval
- Tracy Miller, PATH, Cumberland County-1 case approved and 1 case denied
- Pamalia Davis, Housing for New Hope, Durham- 2 interns are shadowing and learning about SOAR , 5 pending cases at DDS, had first denial of 2014- appealed case, processing 5 more applications
- Aundry Freeman, WNCCHS, Asheville-1 denial and 1 approval, putting in both SOAR and non-SOAR applications
- Liz McDermott, LATCH, Durham- had a community education session for people who want to apply for SSI/SSDI programs

Announcement

- Annual Report for NC SOAR
 - Report includes outcomes submitted from July 1, 2013-June 30, 2014
 - 83% approval rate (higher than last year)
 - Average decisions days- 106 days (an increase from last year)
 - Survey has been sent out to SOAR caseworkers who submitted outcomes in the reporting year to get feedback from the field about collaborations, accomplishments and challenges

Medical Summary Report (MSR)

Overview

- MSRs are vital part of SOAR application
- Purpose of MSR:
 - Combines personal history and medical records into one document and shows how an applicant meets/equals a listing in SSA's Blue Book (<http://www.socialsecurity.gov/disability/professionals/bluebook/AdultListings.htm/AdultListings.htm>)
 - Not a clinical or diagnostic report
- Benefits of MSR:
 - Addresses issues for applicants who have never received long-term care or have only had transient care for conditions and don't have medical records

- Allows information about ongoing issues to be presented to DDS
- If MSR is signed by a physician or PhD psychologist, then it is considered medical evidence and given more weight in DDS' process
- Gives DDS worker a picture of the applicant when they will never see the applicant
 - What do they look like?
 - How do they interact with other people?
 - What is it like to work with this person during the application process?
- Allows caseworker to clarify information in medical records
 - When doctor notes say "patient is doing well"
 - Provides perspective on what the baseline functioning is for applicant
 - Provides functioning information that is not found in medical records
 - Corrects misinformation in records
 - Information that was not reported or reported incorrectly by the applicant
 - Diagnoses that stick around on electronic medical records but are not current
- The act of writing a Medical Summary Report allows the caseworker to listen and hear the whole picture of the applicant's disability

Medical Summary Reports- Section by Section

- Introduction
 - One to two paragraphs that is a descriptive picture of the applicant
 - Demographics- age, weight, height
 - Physical description
 - Clothing, behavior, self-care
 - How long you have been working with applicant and your impressions
 - Tips:
 - Take notes throughout interviews about observations of behavior and appearance so you don't forget
 - Color code information in notes with highlighters so you know what information to put in which section
 - Read a sample Medical Summary Report before writing each section
 - Can see what language others use
 - Gets you in the right frame of mind for writing each section
- Personal History
 - Providing DDS with the applicant's personal timeline
 - Fills in the blanks in between medical records
 - Timeline that DDS can use to hang other medical information on
 - Shows duration
 - Has already affected the applicant for 12 months
 - Show that their disabling condition been an ongoing struggle throughout life

- OR this person was functioning well until the mental health/physical health issue interfered with functioning
 - Include information about:
 - Childhood history- trauma, neglect, who they lived with, personal timeline
 - Developmental milestones- did they meet milestones or were they delayed?
 - Head trauma history- either in childhood or adulthood
 - Education history- what school was like, special education, how far they made it in school
 - Employment history- detailed employment history, what jobs they held, responsibilities, and why they left each job
 - Homelessness and housing history- what happened to their housing?
 - Relationship history- what are their relationships with family, partner and/or children like?
 - Employment and Education history is vital for DDS so they can determine if a person can do past work or any work
- Tips
 - Include collateral information from family, other program staff they interact with, community members, etc.
 - Be sure you stay focused on the purpose of this section and not get carried away with the dramatic personal story
- Substance Abuse History
 - If the applicant has a substance use issue, address this in its own section.
 - Question you are answering: Is the substance abuse material to their disabling condition?
 - If they stopped using, would they still have a disabling condition?
 - Periods of sobriety, judgment of treatment team
- Medical/Mental Health Treatment History
 - Depending on the applicant's situation you may have one or both of these sections
 - Key is grounding this section in what listing you feel they meet in the SSA Blue Book
 - Knowing the listing can help you clarify which medical/mental health treatment records to highlight in this section
 - Look at listing you are going for and highlight the medical records that show how they meet that listing
 - Test results
 - Physical diagnoses and testing
 - Mental Health- looking at symptoms in Part A of mental health listing
 - Tips:
 - Read through the listing before writing this section

- Look at the symptoms to see which listings the person may meet
 - This can be helpful when someone has a number of different diagnoses
 - Make sure that you offer examples of what the symptoms look like for the applicant
 - Use sticky notes while reading the medical records
 - Mark records you want to highlight with sticky notes
 - Once all the sticky notes are gone, then you know you have included everything you wanted to highlight
- Functioning Information
 - Really crucial information for DDS that is not often found in medical records
 - What about their disabling condition is inhibiting them from earning SGA?
 - Physical listings outline the functioning criteria
 - Mental Health listings: ADLs, Social, Concentration Persistence and Pace, Repeated Episodes of Decompensation
 - Tips
 - Organization is the key
 - Keep functioning information organized into paragraphs where all similar functioning problems are in the same paragraph
 - Link functioning problems back to the disabling condition(s)
- Summary
 - Hit the highlights
 - Listing
 - Symptoms
 - Functioning impairments
 - Be sure to include your contact information
 - Be sure to explain how signing doctor knows the applicant
 - How long
 - Treating doctor

Reviewing Medical Summary Reports

- Score yourself with the MSR Scorecard: <http://www.ncceh.org/files/2120>
- Have someone on your team review the report
- Send the MSR to Emily to review- make sure personal information is redacted
- Pilot Writing Circle is available- SOAR caseworkers are in email group where caseworkers can review each other's reports and ask for tips on reports

Next SOAR Dialogue Call is on Thursday September 25th at 10 AM.

Register for the call by following this link: <http://www.ncceh.org/events/767/>