

SOAR Dialogue Highlights

1/15/15

Attendees: Emily Carmody, Randy Glazier, Lisa Carter, Melissa McKeown, Joyce Allen, Tracy Miller, Pamalia Davis, Cecelia Colson, Sioux Free, Jacquetta Bullock, Gina Davidson, Diamond Jenkins, Daphne Drew

Introductions and Updates

- Emily Carmody, NCCEH, Raleigh- Looking to schedule our next SOAR Training in March
- Randy Glazier, Women's Center, Raleigh- just had a difficult case approved for benefits
- Lisa Carter, CenterPoint Human Services, Winston-Salem- New to position and to the group
- Melissa McKeown, Union County Community Shelter- Working through a case and going to the office next week to submit the application
- Pamalia Davis, Housing for New Hope, Durham- Had 2 approvals at the end of the year and 1 denial at the beginning of this year, looking forward to implementing new strategies in 2015 for more approvals
- Cecelia Colson and Sioux Free, Pisgah Legal, Asheville- Just had an approval for a very sick applicant fairly quickly, worked with Susan Reid at DDS to get a presumptive decision, moving forward with a reconsideration
- Jacquetta Bullock, New Direction Ministries, Henderson- Have 1 referral that I'm currently working on
- Tracy Miller, Cumberland County PATH Team, Fayetteville- Waiting for 2 decisions from Donna, filed 6 cases in December
- Daphne Drew, ECBH- 1 case is pending and submitting 2 more cases
- Joyce Allen, Alliance of Disability Advocates, Raleigh- no updates at this time
- Gina Davidson, Monarch- no updates on SOAR

Announcement

- Had a great in-person meeting in December with SSA and DDS. Thank you to everyone who came and added to the discussion!
- Be on the lookout for the next SOAR training in March.
- New SOAR Caseworker position in Raleigh at Urban Ministries Center. They are accepting applications now.

Engaging the Local SSA Field Office

At the in-person SOAR caseworker meeting, we focused on the recent increase in decision days. Throughout 2015, we will be discussing ways to reduce decision times on cases on both the SSA and DDS side of the process.

We have had a number of issues with SSA field offices this past year:

- Not communicating with SOAR workers

- Not filing 1696 Rep forms
- Not following the SOAR process

Emily will send out a survey to all SOAR caseworkers about issues that may be occurring at their local field offices.

Part of systems change is to develop relationships with key partners, including SSA.

Where do I find SSA contact information (fax number, SOAR contact information)?

- SSA contact information is listed on the password-protected SOAR page: <http://www.ncceh.org/nc-soar/>
- Contact information is linked in the 5th bullet on the webpage
 - Includes fax number to send the SOAR Consent for Release of Information form
 - Name of SOAR contact in the local office and their phone number
- If you don't have access to the password-protected webpages, please email soar@ncceh.org with the subject line of "SOAR Password"
- If you know of issues or updates that need to be added to the SSA field office document, please let Emily know at soar@ncceh.org
- It is good to know the name of your SOAR contact so that you can ask for their assistance if you run into trouble at the SSA field office or with claims representatives.

Randy Howell, SSA Liaison for NC SOAR provided tips for engaging local SSA Field Offices:

- Emphasize that you have an expertise in homelessness and offer training on homelessness for the field office
- Reassure the office and the Claims Representatives that you are not taking their job. You want to assist them in gathering information to make sure applications are complete.
- SSA field offices are evaluated on their processing time
 - SOAR Fax starts their processing time
 - The 60 day window that we use to gather information makes SSA field offices anxious
 - Emphasize that the work you are doing on the front end will help to speed up the processing time on the back end with DDS

Tips from SOAR Caseworkers for engaging the local field offices:

- Make friends with the security officer in the lobby
 - Can walk papers back for you
 - Assist with applicants who have issues in the waiting room
- Have a face-to-face meeting with the SOAR Contact and management team
 - Talk through the SOAR process
 - Issues that you have had with the cases
 - Make sure to have real examples
 - Include the Name and SSN from the cases where these issues have occurred
 - Bring solutions as well as issues

- Designated Claims Rep
 - Is there a policy in place that makes SSA offices designate a CR for SOAR Cases?
 - No- there isn't a policy at this point and it is not a part of the SOAR agreement with SSA
 - This is a strategy that works for offices with a heavier SOAR caseload
 - If your office has a high number of SOAR cases, ask for a designated Claims Rep for SOAR cases
 - Emphasize that SOAR works with a challenging population of homeless applicants
 - Would be helpful to have one CR who specializes in homeless applicants that we can develop expertise on homelessness
 - Make sure you have an estimate of what the volume of SOAR cases you are expecting to submit
 - Offer to do a staff training on homelessness and SOAR
 - If you have several SOAR caseworkers in your community, make sure you all attend the meeting
 - Make sure the group decides on a date that you are going to check back in with them about what was discussed in the meeting
- Do a presentation for the SSA field office staff after doing an initial meeting with the SSA field office
 - Trainings take place in the morning, lunch time or when the office is closed in the afternoon
 - Emily reviewed the presentation that she does for SSA field offices
 - Background on your agency and your role
 - Background on SOAR
 - SOAR process with SSA
 - Keep the presentation to about 30 minutes and leave time to answer questions
- SSA field office staff are usually delighted when SOAR caseworkers have all of their paperwork in order because it helps them complete the application
- Make sure that you maintain regular contact with your SSA office
 - Regular meetings can help to monitor ongoing issues
 - Address new issues or ideas that come up
 - Invite SSA field office staff join you at community meetings or events

When to come to Emily with issues at your SSA field office:

- If you have issues with your office including:
 - Paperwork not being filed correctly
 - Large delays in processing of applications
 - If you are having issues with your SOAR contact (not calling, they left, etc.)

- First step- SOAR caseworker calls to address issues as they come up
- Second step- Emily will call to follow up with the SOAR contact at the office if issues are not addressed
- Third step- Randy Howell can follow up with the field office to address issues

Issues at local offices (Emily will check with Randy about these):

- Drop Box has been removed at the Fayetteville SSA office
 - SSA recently passed and then rescinded a policy in December to remove drop boxes
 - Drop boxes should still be available
- Fayetteville SSA contact does not return calls in a timely way
- SOAR Contact for Asheville office left
- PFD Letters
 - Some SSA field offices send out a letter when you establish a PFD with the fax form
 - The letter's wording states that after speaking to the SOAR caseworker SSA is denying the applicant for SSI benefits
 - This letter does not mean what it says, it is automatically generated with the PFD being established
 - Some offices do this and others do not
 - If your office is sending these letters, please warn your applicants ahead of time to avoid confusion

Next SOAR Dialogue Call is on Thursday February 19th at 10 AM.

Register for the call by following this link: <http://www.nceh.org/events/814/>