

SOAR Dialogue Highlights

6/19/15

Attendees: Emily Carmody, Charlene Powell, Sioux Free, Cecilia Colson, Melissa McKeown, Pamalia Davis, Elizabeth Lewin, TJ Reynolds-Emwanta, Elizabeth McDermott, Diamond Jenkins, LaTonya McKoy, Michelle Roberts

Introductions

- Emily Carmody, NCCEH, Raleigh- Scheduling summer SOAR training for August
- Charlene Powell, ECBH- 3-4 approvals in the last month, DDS has been asking for more applicant information in order to speak to examiner
- Sioux Free and Cecelia Colson, Pisgah Legal, Asheville- 4 approvals this week
- Melisa McKeown, Union County Community Shelter, Monroe- Had 1st approval last month
- Pamalia Davis, Housing for New Hope, Durham- Cases are pending at DDS and had 2 denials at Recon
- Elizabeth Lewin, PATH, Statesville- Have had approvals, working with a client that is not disclosing symptoms to doctors
- TJ Reynolds-Emawanta, Centerpoint Human Services- Have seen an increase in wait time at DDS, did a training for providers to learn more about SOAR that went well and will hopefully increase referrals from rural counties, plan to do these trainings every 2 months
- Liz McDermott, LATCH, Durham- Have seen a long wait period with Donna being out
- Diamond Jenkins, Southlight, Raleigh- Challenging month with 3 denials
- LaTonya McKoy, Southlight, Raleigh- Cases continue to move along
- Michelle Roberts, Urban Ministry Center, Charlotte- I am with a new agency doing SOAR, a different population with more substance use that is challenging

DDS Challenges

SOAR caseworkers provided feedback about some challenges at DDS.

- New phone system-
 - The new phone system is routing calls to examiner assistants who act as gatekeepers and often don't want to transfer caseworkers to the examiner's voicemail.
 - Caseworkers ask that DDS either provide direct phone numbers for examiners or educate assistants of SOAR examiners about the SOAR program
- Donna Gould has been out due to illness in the family-
 - Kathy Wright and Susan Reid are helping to process Donna's SOAR cases
 - Some caseworkers report challenges in being able to get barcodes to submit medical evidence
 - Other caseworkers report that Susan has been very helpful in getting medical records into the file
 - Caseworkers asked if decisions would have to wait until Donna's return

- Caseworkers requested that DDS provide instructions about who to call and how to submit evidence while Donna is out of the office

Emily will provide DDS with the gathered feedback and requests. An update on DDS information will be provided with the notes from the call.

Engaging Physicians

Physicians and Psy.D. Psychologists are important partners in completing SOAR cases. Physicians and Psy.D. Psychologists remain the only two professionals that can make medical diagnoses and provide medical evidence in the SSA system. By working together and cosigning Medical Summary Reports, SOAR caseworkers and doctors can strengthen the case for applicants significantly by creating medical evidence that clearly explains how applicants qualify for benefits.

However, these professionals are rarely educated about the SSA system and carry their own myths and misconceptions about disability benefits. SOAR caseworkers can sometimes face barriers in educating and engaging physicians in the process.

SOAR caseworkers identified some challenges they have faced in the field:

- The changing medical and mental health treatment systems mean that uninsured patients are served by medical professionals who are not doctors: nurse practitioners, physician's assistants, and licensed clinical social workers.
- It is hard to engage applicants in the service system
 - The applicant could not want to seek treatment
 - Access to treatment without insurance is very difficult
- Physicians state that they don't want to participate:
 - Concerns about relapse or overdose for applicants who have a history of substance use
 - Belief that participation is a conflict of interest since their clinic will be reimbursed for services if the applicant is approved
 - Concerns about signing a document that they did not write
 - Belief that they may be held liable for providing information to SSA

SOAR caseworkers provided tips to overcoming these challenges:

- Explaining Representative Payees and how they are assigned to address concerns over ongoing spending decisions and substance use
- Let physicians add a note under their name where they can state additional comments
- Find common doctors used in clinics and hospitals and develop relationships with them
 - More likely that they will treat applicants
 - Having a champion physician within an agency or system can help with engaging other doctors
- Do presentations about SOAR for doctors and medical providers to educate them about disability benefits and SOAR
 - Provides room to talk without immediate ask of signing a report

- Can have a doctor co-present with you to have a peer state the importance of partnering
- Find out who the doctors listen to within the agency or community (social workers, agency administrators, etc.) and engage them in SOAR to help engage the physician in SOAR too
 - Example of partnering with the case manager or therapist for the applicant to go to the doctor on the SOAR caseworker's behalf
 - A SOAR caseworker found that a key relationship with a hospital social worker has led to other doctors supporting SOAR

NCCEH has created a Physician Engagement Tool that can be found on the website: <http://www.ncceh.org/files/3170/>. SOAR caseworkers can use this tool in their engagement efforts to help explain SSA, disability benefits and SOAR.

Next SOAR Dialogue Call is on Thursday August 20th at 10 AM.
Register for the call by following this link: <http://www.ncceh.org/events/912/>