

SOAR Dialogue Highlights

8/20/15

Attendees: Emily Carmody, Diedtress Jackson, Lisa Carter, Diamond Jenkins, LaTonya McKoy, Pamalia Davis, Linda Mandell, Joyce Allen, Joanna Fullmer, Aundry Freeman, Candice Chilton, Tracy Miller, Sioux Free, Cecelia Colson, Elizabeth McDermott

Introductions

- Emily Carmody, NCCEH, Raleigh- Just had a great SOAR training in Burlington
- Diedtress Jackson, Urban Ministry Center, Raleigh- Approval in the last week
- Lisa Carter, Centerpoint Human Services, Winston-Salem- Getting a lot of referrals, had another approval
- Diamond Jenkins and LaTonya McKoy, Southlight, Raleigh- We are here to learn more today
- Pamalia Davis, Housing for New Hope, Durham- Had 2 approvals, 2 denials, 4 cases at DDS
- Linda Mandell, Pitt County, Greenville- Had a recent approval and now the applicant is housed and doing really well
- Joyce Allen, Disability Advocates, Raleigh- Recent approval with lots of back pay so working on housing, 1 at DDS, beginning one this month
- Joanna Fullmer, Wake County, Raleigh-Started 2 applications this month and starting a third one today
- Aundry Freeman, WNCCHS, Asheville-No updates at this time
- Candice Chilton, LATCH, Durham- No new updates
- Tracy Miller, Cumberland County, Fayetteville-4 pending cases and several referrals this month
- Sioux Free and Cecelia Colson, Pisgah Legal, Asheville- Staying busy
- Liz McDermott, LATCH, Durham- No updates at this time

Announcements

Messages from DDS:

- SOAR process is only to be used for people who are homeless or at risk of homelessness
 - You may help people who are housed but they are not eligible for the SOAR process at SSA and DDS
 - Applicants who are receiving rental assistance through a program but have no income are at risk of homelessness and would be a SOAR case
 - Living with family in a stable situation does not count as a SOAR case
 - If you have any questions about whether an applicant is homeless or at risk of homelessness, contact Emily at soar@ncceh.org
- Need to get all paperwork (all the SSA forms- Adult Disability Report, SSDI, SSI,827, and 1696) submitted to SSA at one time
 - If you are taking a case in the middle of the process, turn your 1696 form in as soon as possible

- Remember, cases will not be transferred to Donna if it has been assigned to an examiner for longer than 5 days
- Caseworkers can hold on to medical evidence and submit that to DDS using the barcode for that specific case

Cases being transferred out of state:

- Emily spoke with DDS and they stated transfers were happening with Recon cases
- This is a normal process once DDS reaches capacity in the number of cases they can process
- Cases get sent to other DDS agencies that contract with the NC DDS
- If your case is transferred, work with them as normally would:
 - Submit medical evidence
 - Be in contact with them on a weekly basis
 - If you have any issues, contact Emily so that she can report issues at soar@ncceh.org
- DDS examiners in other states are not necessarily aware of SOAR
 - This means it is an education process for the examiner
 - Explain how you will be involved in the process
 - If you have issues with them taking your MSR as evidence or if they are not recognizing you as the Rep, then you need to let Emily know at soar@ncceh.org so she can report that to NC DDS
- If you have a state that your cases keep getting transferred to, let Emily know and she will follow up with that state's SOAR lead to see if they have a SOAR process at DDS

Infographic

- NC picked as one of three states to work with a TA firm to develop an infographic document using our SOAR outcomes
- If you have a success story that you can share with NCCEH to include in the document, please email Emily soar@ncceh.org

Medical Summary Reports: Addressing Listing Criteria and Substance Use

Medical Summary Reports (MSRs) are one of the most important components of the SOAR process. The applicants that we help with SOAR often have incomplete or inadequate medical records, and this poses a challenge for SSA/DDS to determine eligibility. MSRs help to fill in the gaps by providing more complete information while highlighting how the applicant meets DDS's medical criteria for benefits.

Often SOAR caseworkers gather a lot of information from interviews and records, which can be overwhelming when it comes to condensing all of this into a report. It's important to remember DDS's main question: How does this impairment inhibit their ability to work?

Including Blue Book Listings into Medical Summary Reports
Symptoms (Physical Listings, Part A of Mental Health Listings)

- Do you have to choose just one?
 - No- be sure to write about all the issues that this person is facing

- Someone can be approved due to the sum of all the issues they are dealing with rather than just one condition
- Let the symptoms be the guide on choosing the listing for cases with mental health listings
 - What symptoms does the applicant report?
 - What symptoms are listed in the medical records to confirm what is reported?
 - Then look at the listings to figure out which listing they meet
 - Can be effective when people have multiple mental health diagnoses
- When writing the MSR, make sure to include all information (symptoms, work history, physical issues, etc.) because these pieces of information can play a significant role in DDS's decision
- It can be frustrating that DDS can't see from medical records that someone is disabled
 - Our medical records do not speak to DDS's eligibility criteria
 - We speak different languages (medical records and DDS) and the MSR can help in translating from the medical record to DDS's language
 - Explaining what jargon means in the records
 - Describing what symptoms, diagnoses mean in real life for the applicant
 - Partner with medical providers to help with the translation
 - Show doctors, nurses, clinicians the DDS Blue Book Listings
 - Have them explain how the person meets a listing
 - Helps with educating doctors about SSA criteria too

Functioning (Part B of Mental Health Listings)

- Provide a description of the applicant to make sure DDS can "see" the applicant
- Write about your observations in working with the applicant
- Make sure to link functioning problems back to the diagnosed impairment
 - Find the root symptom(s) that is getting in the way of them functioning well
 - The "why?" is a crucial piece for DDS to know
- Look to past work history is a great place to look for functional information
 - Why have they left past positions?
 - This is great information because it shows how functioning impacts working
- Functioning is key because a lot of people have diagnoses and symptoms that are able to earn well over Substantial Gainful Activity
 - MSRs have to show that the symptoms experienced are impacting their functioning
 - AND that this impairment of functioning is getting in the way of them working and earning SGA

Substance Use (Is the substance use material to their disabling condition?)

- It is important to address substance use directly in the MSR
- Aundry will share a form that she has medical providers complete to answer whether substance use is material or not
- Aspects to look at to determine if material:
 - When did the use start? How does this relate to their personal history?

- Do they use the substance to manage symptoms of their impairment?
- Don't be shy in addressing that the substance use is not material to their disabling condition
 - You can assert your opinion here
 - Address this head on with DDS in the report

Emily is happy to review Medical Summary Reports for caseworkers to offer suggestions in strengthening reports. Also, be sure to use the MSR scorecard to review your reports and see if you are missing any information.

Next SOAR Dialogue Call is on Thursday September 17th at 10 AM.
Register for the call by following this link: <http://www.ncceh.org/events/933/>