

SOAR Dialogue Highlights

9/17/15

Attendees: Emily Carmody, Sioux Free, Cecelia Colson, Pamalia Davis, Aundry Freeman, Candice Chilton, Jacquetta Bullock, Diamond Jenkins, Lisa Carter, Elizabeth Lewin, Joanna Fullmer, Tracy Miller, Joyce Allen, Linda Mandell

Introductions

- Emily Carmody, NCCEH, Raleigh- In process of scheduling next SOAR training in December in Asheville
- Sioux Free and Cecelia Colson, Pisgah Legal, Asheville- 2-3 approvals this month, 2 denials, staying busy
- Pamalia Davis, Housing for New Hope, Durham- No updates
- Aundry Freeman, WNCCHS, Asheville-3 approvals this month (not all SOAR cases)
- Candice Chilton, LATCH, Durham- No new updates
- Jacquetta Bullock, New Direction Ministries, Vance County- No new updates
- Diamond Jenkins, Southlight, Raleigh- SOAR workgroup is going well in Wake County and a number of pending claims
- Lisa Carter, Centerpoint Human Services, Winston-Salem- 1 denial, 1 pending, working on 2 applications
- Elizabeth Lewin, PATH, Statesville- Recently had 2 approvals, working on 6 applications
- Joanna Fullmer, Cornerstone, Raleigh-Started 2 applications this month
- Tracy Miller, Cumberland County, Fayetteville-1 approval from a hearing and a denial this month
- Joyce Allen, Disability Advocates, Raleigh- 1 approval and waiting on a decision

Announcements

- Please submit SOAR Outcome Forms as you get decisions on cases!
- Messages from DDS:
 - Please make sure that all information that you are submitting in Medical Summary Reports is accurate, including diagnoses and IQ scores
 - Caseworkers can be held personally liable for reporting incorrect evidence to DDS
 - Please make sure that you read over your reports and records to make sure that you are reflecting accurate information in your reports

Consultative Exams (CEs) and SOAR Cases

Consultative Exams (CEs) are appointments with doctors that DDS contracts with. DDS sends applicants to these doctors in order to gather additional information about the applicant. CEs are often scheduled when there is not enough medical information for DDS to make a decision or if there are no recent treatment records (within the past year) submitted to DDS.

If an applicant has a CE scheduled, be sure that they make the appointment. If an applicant misses two scheduled CE exams then their application can be denied. This can be a challenge because appointments can be scheduled at odd hours and off of public transportation lines.

Why does DDS send someone for a CE?

- The applicant does not have a current treatment provider or records from a current treatment provider
 - Older records are important but DDS needs recent assessments to make a decision
 - As you identify applicants to work with, be sure to link them to a treatment provider for current treatment records
- If they have a current treatment provider, sometimes DDS sends people to specialists to evaluate particular impairments if their provider is more of generalist
- An applicant needs to be sent for particular tests (IQ testing, MRIs, etc.)
- CEs can also be called for backup evidence/second opinion to affirm medical evidence that has been submitted to DDS for the case

How do you prepare an applicant for a CE?

- Preparation can help applicants to know what the CE is, what information they will be asked, and what information they need to provide to the doctor
- Talk with clients to discuss what the majority of their days are like (not just feeling good today)
- Discuss CEs with client while driving them to the CE appointment
- Prepare applicant while working on the case so that they know it is a possibility
- Discuss with clients that this is not a job interview- we do not need to present ourselves in the best light
- Let applicants know that the doctor is not making the decision but is simply doing an evaluation- makes them feel like they don't have to prove anything
- Tell applicants that this is the time to talk about issues they are having even if it is hard to talk about these with someone they don't know- recognizing and naming this as a difficult thing
- There is a worksheet available in the SOAR binder that goes over common CE questions asked during appointments- could review these with the applicant
- Have the applicant make a list of symptoms and information that they want to be sure to talk about the doctor with

What to do when a CE seems to be inadequate?

- Sometimes CEs can be inadequate
 - Exams take a short amount of time (5 minute mental health status exams)
 - A nurse practitioner completed the exam instead of the doctor
 - A doctor can be insensitive to issues of homelessness
- If you have appointments like this, please report it to DDS
 - Jessica Veasey needs to know this information
 - She will often have clients complete a form to provide feedback about the appointment

- This is not an attack on someone, it is being an advocate and stating what you witnessed
- If you have a CE that is inadequate and are struggling with what to do, please feel free to contact Emily to talk through options

How do we make sure someone gets a quality CE?

- If the doctor who is completing the CE is receptive, you can provide them with some medical evidence or your MSR to provide them context about what is going on with the applicant
- You can request a particular doctor that contracts with DDS to complete the CE so you make sure the applicant sees someone who is thorough and good with applicants who are homeless
- DDS is looking to recruit doctors for CEs, mostly in rural areas of the state, so if you know of doctors who are great and understand homelessness, then you can connect them to DDS to see if they are interested in completing CEs
- Often CE doctors are working with providers in the community
 - Caseworkers can make sure that their applicants get referred to these doctors for ongoing treatment
 - If these doctors sign your MSRs, then the report has that much more credibility with DDS

If you feel like a CE would be helpful, how do you advocate for DDS to schedule one?

- There are times when SOAR caseworkers feel that a CE would be helpful for DDS to see a complete picture of the applicant
- CEs can also be useful for testing that is not readily available for the uninsured (IQ testing, sleep evaluations, etc.)
- It is still DDS's decision to schedule a CE so they may or may not see a need for one
- Point to medical records that may reference evidence of issues that have not been assessed recently

If the majority of your cases are being sent for CEs, contact Emily to see how you can strengthen the medical evidence that you are submitting.

Next SOAR Dialogue Call is on Thursday, October 15th at 10 AM. The phone call will focus on setting an agenda for the in-person SOAR Caseworker meeting.

Register for the call by following this link: <http://www.ncceh.org/events/936/>