

SOAR Dialogue Highlights

5/19/16

Attendees: Emily Carmody, Natasha Posey, Nitki Kilgore, Lisa Carter, Pamalia Davis, Sioux Free, Sandra Johnson, Meg McBride, Erica Hall

Introductions

- Emily Carmody, NCCEH, Raleigh- Next SOAR training will be in June
- Natasha Posey, Southlight, Raleigh- Completed first Medical Summary Report and just got it signed
- Nitki Kilgore, Pisgah Legal Services, Hendersonville- No updates at this time
- Lisa Carter, CenterPoint Human Services, Winston-Salem- 1 approval and 3 pending cases
- Pamalia Davis, Housing for New Hope, Durham- 1 TERI case, 3 approvals and 1 denial that will be sent for Reconsideration
- Sioux Free and Sandra Johnson, Pisgah Legal Services, Asheville- No updates at this time
- Meg McBride, Coastal Disability Advocates, Wilmington- New Hanover Regional Medical Center just increased funding to make position full-time
- Erica Hall, Duke LATCH Program, Durham- Still working on first case

Announcements

- Greenville SOAR Training Scheduled!
 - June 29-30, 2016
 - Follow this link to complete an application for the training:
<http://www.ncceh.org/events/982/>

Substance Use and SOAR Applications

Many SOAR applicants are currently experiencing or have experienced co-occurring disorder of substance use and disabling conditions. Applicants who have substance use issues can still be approved for SSI/SSDI benefits, but SSA and DDS have one main question: Is the substance use material to the disabling condition?

If the substance use is not material to the disabling condition, then the individual could stop using substances, and they would still have a disabling condition that impacts funding and prevents the applicant from earning SGA.

SOAR caseworkers need to address substance use and whether it is material or not in their Medical Summary Reports.

Below is a discussion with SOAR caseworkers about working with applicants who have co-occurring disorders.

What does it look like when an applicant has a substance use issue that is not material to the case?

- They have a history of episodes of sobriety and continue to have symptoms and functioning problems.
- The disabling conditions and symptoms were the reason they started using substances—to self-medicate.
 - This could be a direct link (drinking helps to quiet auditory hallucinations)
 - OR indirect (the applicant felt different than peers and used drugs to try to fit in)
- They have a history of trauma and substances provide a way to deal with that past trauma.
- You look for patterns of use or heaviest use to see what are the triggers for substance use and if it linked to their disabling condition.
- Family history of substance use provides context for how drugs were viewed in the home and if they were available at a young age.

How do you gather information about substance use?

- Use family or friends to help provide additional information and give context to what the applicant tells you
- Make sure to create a comfortable environment to talk about substance use
 - Meet them where the applicant is comfortable
 - Explain why you need to know this information
 - Make sure you are in a good place with engagement and have established trust
 - Give the applicant a heads up that you need to talk about substance use at the next meeting
- Use the substance use worksheet from the SOAR manual as a guide for conversation
- Look at medical records
 - Need to make sure if medical records have old substance use issues as current
 - Look for documented sobriety where function issues and symptoms are still noted
 - Look at ER records for times when blood panels show sober and what behavior/symptoms were documented
- Discuss with their treatment provider or doctor to see if they think the substance use is not material.

What happens when you are not sure if the substance use is material?

- Use team for feedback and to gather more information about behavior and substance use.
- Ask the referring agency for a current and past psychological assessment to see if primarily substance use issues are reported. This also helps to educate referring agencies about what makes a good SOAR referral.
- Discuss with other SOAR caseworkers to get their feedback.
- Look at the Blue Book for guidance to see what other listing they could meet.
- Use this as an opportunity to engage the applicant in substance use treatment to get documented clean time and assess functioning.

How do you address issues where substance use and honest conversation about substance use could cause the individual to have to leave a program or housing situation?

- Have a conversation with program management prior to doing SOAR applications to see if they can give some leeway in allowing applicants to answer honestly.
 - Let applicants know what these boundaries are and why it is important to be honest in answering
- Be aware that substance use can cause times when the applicant disappears while using.
 - Ask the applicant how you should be in touch with them in this scenario.

Next SOAR Dialogue Call will be on June 16, 2016 at 10 AM. Please register for the call here:

<http://www.ncceh.org/events/984/>