

SOAR Dialogue Highlights

6/16/16

Attendees: Emily Carmody, Natasha Posey, Pamalia Davis, Sioux Free, Sandra Johnson, Erica Hall, Tracy Miller, Elizabeth Lewin, Joanne Dennehy

Introductions

- Emily Carmody, NCCEH, Raleigh- Next SOAR training will be in a couple of weeks
- Sioux Free, Sandra Johnson and Joanne Dennehy, Pisgah Legal Services, Asheville- Sandra received first approval
- Natasha Posey, Southlight, Raleigh- No updates
- Pamalia Davis, Housing for New Hope, Durham- 1 TERI case that will most likely be approved, 1 pending case and 1 approval that is at quality review
- Elizabeth Lewin, PATH Team, Statesville- a couple of presumptive approvals, 1 denial
- Tracy Miller, PATH Team, Fayetteville- 2 approvals and 1 denial since the last phone call

Announcements

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

What to do after an applicant is approved?

While a majority of the work that SOAR caseworkers do is focused on the application process and getting applicants approved, the work does not stop once an applicant is approved for benefits. From the follow up appointment at SSA to preparing applicants for managing money, SOAR caseworkers think through steps to make sure that the transformation from applicant to beneficiary goes smoothly.

SSA Follow Up Appointment-

After clients are approved for benefits, SSA schedules a follow up appointment with them to review necessary paperwork to turn benefits on. SOAR caseworkers are encouraged to attend this meeting with the applicant and to prepare documentation ahead of time to make this process go smoothly.

SOAR caseworkers need to be sure to prepare:

- If a payee is needed, identify who this will be (professional/personal) and contact them ahead of time
 - Bring paperwork completed for professional payee service
 - If a personal payee (family/friend), have them come to the follow up appointment
- Take a portion of the file and make sure you know the current status of:
 - Housing-

- Are they still homeless?
 - Obtain verification letter from shelter/provider
 - Prepare details of where if unsheltered
- Know if they have been in jail or state hospital for a full calendar month since the PFD or in the past year (this could affect backpay)
- If in a rental situation, bring lease.
- If in a housing program, bring paperwork from the program to show the person will contribute towards their rent once they have income
- Marriage documentation if necessary
- Working- bring pay stubs and paperwork
- Take the SOAR fax form to confirm PFD

Payee-

Many SOAR applicants are required to have a payee to help them budget their benefits. SOAR caseworkers need to know who the professional payee services are in their community and how to talk about payees with applicants.

SOAR Caseworkers foster relationships with professional payees:

- Many SOAR community work groups invite payees to do presentations or attend meetings to develop relationships
- SOAR caseworkers can ask other providers (housing, mental health, etc.) in their community about local professional payee services
- SOAR caseworkers can also check with attorneys in town to see if they know of payee services
- SSA can be another resource in finding payee services

Things to think through if the applicant wants to choose a family or friend:

- Discuss with them how money may impact their relationships with family/friend and the possibility of them being taken advantage of
- SOAR caseworker can let SSA know about concerns with choice of payee
 - SSA will then ask follow up questions to determine if appropriate

SOAR caseworkers need to have conversations with applicants about the possibility of a payee.

- The payee conversation needs to start long before a decision is reached
- Make sure the applicant understands the role of the payee
 - They get to work with the payee to set the budget
 - The payee will take care of their bills to make sure housing is stable and needs are met
 - Payee can help address budgeting issues that they may have already identified
- If the beneficiary is concerned that the payee taking money, they can request a report from the payee for a full accounting of how the money was spent

Housing-

Now that an applicant is approved for benefits, SOAR caseworkers need to connect them to housing resources in their community.

Tips for making sure applicants are linked to housing:

- Make sure that the applicant is coordinated assessment in your community
- Once approved, be sure you know who to update within the coordinated assessment process that they now have income
 - Some SOAR caseworkers participate in ongoing coordinated assessment meetings

Substance Use Issues-

For those applicants that have had substance use issues or are currently dealing with substance use, preparing them for receiving money is important.

Tips for conversations to have with applicants about possible relapse or increased use:

- Prepare them along the way to think about how they will plan for receiving money
- May want to increase supports like NA/AA meetings

Sometimes situations occur when applicants relapse or rapidly increase use. How do SOAR caseworkers deal with the feeling of hopelessness or guilt in these situations?

- Need to recognize that it is ultimately the person's choice as to what they are going to do
- Understand that it isn't realistic to think that you could prevent them from using
- Use your team/coworkers for support and to be on the lookout for concerning behaviors to address with the applicant
- Understand that it's a partnership and you can't want it more from them than they want it.

Next SOAR Dialogue Call will be on August 18, 2016 at 10 AM. Please register for the call here:

<http://www.ncceh.org/events/990/>