

SOAR Dialogue Highlights

8/18/16

Attendees: Emily Carmody, Natasha Posey, Sioux Free, Sandra Johnson, Tracy Miller, Elizabeth Lewin,
Joyce Allen

Introductions

- Emily Carmody, NCCEH, Raleigh- Annual SOAR outcome data was submitted to the national program for NC- 80% approval rate in 99 days average decision
- Sioux Free and Sandra Johnson, Pisgah Legal Services, Asheville- no approvals this month, some denials
- Natasha Posey, Southlight, Raleigh- an approval and a couple of denials
- Elizabeth Lewin, PATH Team, Statesville- 2 approvals and 2 denials this month
- Tracy Miller, PATH Team, Fayetteville- submitted a couple of applications, 2 denials since last call

SOAR Referrals

The referral process is a crucial part of the SOAR process for SOAR caseworkers. Caseworkers need to insure that they are getting referrals for those who are homeless with disabling conditions that could qualify for SSI/SSDI benefits. Setting up a good referral process involves having good communication with agency staff, outside agencies who refer, and the applicant who has been referred. Healthy referral processes involve ongoing education and conversation with referrers about what makes a good SOAR applicant.

Listed below are notes about common challenges SOAR caseworkers face in setting up a good referral process and tips from fellow caseworkers about addressing these challenges.

Agencies Need to Understand SOAR

- In-person trainings and ongoing meetings have led to good referrals
- Sometimes doing just one presentation for agencies isn't enough for the information to stick
- Relationship building and good communication with agencies is what works
 - Explain why you will or will not take certain referrals to show the agency your thought process
 - Meet with them to insure you are covering issues with staff turnover
 - Get the buy in for SOAR with the leadership of organizations so they can emphasize its importance to staff
- Referrals tend to improve over time
- When you do an in-person training, include case examples and talk through why it would or would not be a good SOAR referral
- Use the MCO to get a foot in the door with referring agencies

Agencies/Coworkers Send Bad Referrals Consistently

- Include in your referral form the key eligibility requirements for SOAR to make sure they are walking through the thought process of what makes a good referral
- Hold regular meetings and trainings about disability requirements in the community to expand knowledge
- Follow up with the agency and have a phone call with them about why the referral is not a good one

Agencies Not Sending Referrals

- Make sure to re-introduce yourself and your agency to the community if it has been some time since you have talked to them
- Let agencies know all the services you can help connect people to
- If you are facing sentiment that the SSI/SSDI process is hopeless, supply the agencies with SOAR outcomes to show another way is possible
- Again, MCOs can be helpful in encouraging agencies to send referrals

Case Quotas Lead to Submitting Poor Cases to Reach Numbers

- Many shared the sentiment that the pressure to meet numbers may lead them to submitting a case that is not good quality to meet goals
- Start assessing the person as a SOAR applicant as soon as the person is identified- having more vetting before the referral is officially made helps to improve the referrals you get
- If you are meeting monthly and quarterly numbers, sometimes it is helpful to look at quarterly goals to make sure you are on target for the year just in case one month you don't meet numbers
- Take more referrals than cases you have to complete for your outcomes so you have some space to consider moving ahead with applications or not

Medical Records Don't Match What the Applicant Says at Referral

- Get medical records as a part of the referral process
- Have the current medical/mental health provider agree to support the application and Medical Summary Report as a part of the referral process
- Request medical records as soon as possible
- If the applicant is not telling their current provider the full scope of what is going on for them, encourage them to talk to the provider
 - You can support them by being there for the conversation
 - You can ask if it is OK for you to share with the current provider
 - These conversations may lead to better diagnosis and treatment for the applicant

If you do not move forward with a case as a SOAR application, be sure to:

- Explain why to the applicant
- Inform them that they can apply for benefits on their own if they would like

- Offer them another referral for an employment program

Next SOAR Dialogue Call will be on September 15, 2016 at 10 AM.
Please register for the call here: <http://www.ncceh.org/events/1001/>