

SOAR Dialogue Highlights
10/27/16

Attendees: Emily Carmody, Diamond Jenkins-Nelson, Natasha Posey, Tashira McGill, Candice Chilton,
Sandra Johnson, Elizabeth Lewin

Introductions

- Emily Carmody, NCCEH, Raleigh- Great SOAR training in October, looking at updating trainings for new mental health listings
- Diamond Jenkins-Nelson, Southlight, Raleigh- Had 1 approval and 3 denials, 1 denial was pulled back by quality review for a consultative exam so the decision may not stand
- Natasha Posey, Southlight, Raleigh- No significant updates, facing some challenges with engaging applicants
- Tashira McGill, LATCH, Durham- Durham SSA moved and the fax line is offline until November 2nd
- Candice Chilton, LATCH, Durham- LATCH program looked at most recent Medicaid billing since 2010, total is \$5,190,946 with 15 people whose information is not included yet, average per patient is \$34,606
- Sandra Johnson, Pisgah Legal Services, Asheville- slow at the moment, lots of referrals but many are not homeless or are in medical record gathering stage
- Elizabeth Lewin, PATH Team, Statesville- Still loving my job and had some approvals

News from SSA

Cost of Living Adjustment announced for 2017

Key amounts for SOAR Caseworkers to know:

	2016	2017
Substantial Gainful Activity		
Non-Blind	\$1,130/mo	\$1,170/mo
Blind	\$1,820/mo	\$1,950/mo
Trial Work Period for SSDI	\$810	\$840
SSI Full Benefit Amount		
Individual	\$733/mo	\$735/mo
Couple	\$1,100/mo	\$1,103/mo
Resource Limits for SSI (SAME)		
Individual	\$2,000	\$2,000
Couple	\$3,000	\$3,000

Comments on Expanded Medical Sources

- SSA is seeking comments on new rule to expand medical sources to Nurse Practitioners and a possible expansion to Physician Assistants and Licensed Clinical Social Workers
- Comments are due November 8th

- Emily will resend the template for comments to SOAR caseworkers
- There will be opposition to these changes so input from SOAR caseworkers is vital

Updates to SSA Mental Health Listings

- SSA announced that they will begin using updated mental health listings as of January 17, 2017
- SOAR Caseworkers can find the updated mental health listings starting on page 66161-66168: <http://bit.ly/2duFQM9>
- While the listings are changing, the backbone of the SOAR model stays the same:
 - Acting as the Representative
 - Gathering and sending medical documentation
 - Writing Medical Summary reports
- Highlights from the changes include:
 - Listing titles are updated to reflect terms in the DSM-V
 - New adult listings:
 - Neurodevelopmental disorders
 - Eating Disorders
 - Trauma and stressor-related disorders (PTSD)
 - Substance use disorder has been removed
 - Four areas of functioning for all listings is changing
 - Understand, remember or apply information
 - Interact with others
 - Concentrate, persist or maintain pace
 - Adapt and manage oneself
 - Activities of Daily Living can be used as examples in all of these functioning areas
 - Functioning will be rated on a scale of 1-5
 - 4 is marked limitations and 5 is extreme limitations
 - A person will need to have two functioning areas with marked limitations or one area with extreme limitations to meet the listing
- The national SOAR program will be holding webinars this fall to prepare caseworkers for the changes
- It is anticipated that this will be a topic for the SOAR caseworker meeting
- NCCEH will keep everyone posted on trainings and resources so caseworkers feel comfortable writing Medical Summary Reports for the new criteria

Planning for SOAR Caseworker Meeting

- NCCEH is working to find a location for the December 8th SOAR caseworker meeting
- SSA and DDS have indicated they can both attend
- Topics to consider for the agenda
 - New mental health listings- get input from DDS on the new listings
 - Reviewing data from the past year and how that fits in with trends
 - How to address medical records that show bias or are not supportive of the case

- Getting quality referrals
 - How to develop relationships to get good referrals from agencies
 - How to engage new systems in sending referrals (jails, prisons, Dept. of Social Services)
- Engaging service providers to support SOAR applications by providing information and reducing barriers to services and records
- Emily will work on pulling together the agenda for the meeting and contact SOAR caseworkers to assist in activities

No SOAR Dialogue Calls in November and December due to SOAR Caseworker Meeting.