

SOAR Dialogue Highlights

6/22/17

Attendees: Emily Carmody, Sioux Free, Sandra Johnson, Pamalia Davis, Elizabeth Lewin, Diamond Jenkins, Coby Crandall

Introductions

- Emily Carmody, NCCEH, Raleigh- I am back in the office from maternity leave, and we have a SOAR training coming up next week. Mecklenburg County jail just received a national TA grant to set up a SOAR program in the jail system.
- Sioux Free, Sandra Johnson, Pisgah Legal, Asheville- Starting to get approvals on cases which is raising moral
- Pamalia Davis, Housing for New Hope, Durham- Two approvals and 2 denials on cases. One denial is going to an attorney for appeal and one will be filed as a Reconsideration. Currently having issues with people going to medical appointments to create recent medical documentation.
- Elizabeth Lewin, Fifth Street Ministries, Statesville- Having some cases approved and some denied. I want to set up a time to talk about denied cases and get some feedback.
- Coby Crandall- I am going to the training next week and wanted to sit in on the call today to hear about more about SOAR.
- Diamond Jenkins, Southlight, Raleigh- We are doing more appeals at the moment. We have had a number of approvals and are working on more complicated cases at the moment.

Announcements

- NC SOAR Process-
 - Email about not using the NC SOAR Consent for Release of Information form from the national SOAR office
 - NC SSA contact says to continue with status quo until new agreement is signed with SSA
 - Emily will keep everyone posted on this as things change.
- SSI application now available online for some populations
 - SOAR caseworkers should continue with the recommended process of completing an online application and submitting it the day before a scheduled appointment with SSA
 - This will insure that all paperwork is completed with the office

Impact of Institutional Stays (Jail/Hospital) on SOAR Applications

Background: Many SOAR caseworkers work with applicants as they move in and out of the jail and state hospital system. Being in an institution like this does not mean that you have to stop working with someone. For many folks, they are in and out of the jail system with little impact on the application. Here are some things to keep in mind:

1. How long will the person be in jail or the hospital?

SOAR caseworkers can find this out about jail stays by contacting public defenders or seeing what the charges are for the applicant. For hospital stays, the hospital social worker is able to provide an estimate of length of stay.

If it is expected to be a short stay, then continue to work with the applicant. If the applicant's case is at DDS, SOAR caseworkers should let the examiner know in case consultative exams need to be re-scheduled or scheduled to accommodate the timeline.

If the jail or hospital stay will be longer (several months to several years), then it may be necessary to withdraw the application and reapply when they are closer to their discharge date. Applications can be submitted 30 days prior to release and some jails and state hospitals have agreements with SSA that allow for applications to be submitted 90 or even 120 days prior to discharge.

2. What is the impact on payment?

If the person is approved for SSI benefits and they spend a FULL CALENDAR MONTH in jail or a hospital, SSA will not pay benefits for that month. This would mean that the month(s) in the institution is not included in a back pay total or if they are currently receiving benefits, that month's check will be withheld.

Be aware that many people get into an overpayment situation because SSA finds out after the fact that they paid for a month where someone was in an institutional setting. Avoid this overpayment by keeping SSA up to date.

If a person is in jail or the hospital for a full calendar month and receiving SSI benefits, they need to notify SSA as soon as they get out to reinstate their benefits. If the benefits stay suspended for 12 months, SSA will terminate them and the applicant will have to reapply.

Below are highlights from a conversation with SOAR caseworkers in the field about how jail and state hospital stays impact SOAR applications.

Jails

- Current issues in the field
 - Applicants go into jail when they have consultative exams scheduled
 - Staff within the systems do not communicate
 - Get a plan worked out with a staff person and other not informed
 - Work schedules are such that your contact can be off for several days
 - Releases from jail that are sudden or not when expected mean losing touch with applicants
- Benefits of applicant being in jail
 - Applicant is able to be interviewed
 - Able to find the applicant
 - Because you are a visitor, applicants often want to talk more

- Ask for an attorney room for interviews so you can insure a more private conversation
 - Evaluate sobriety
 - If the applicant is actively using substances, jail settings provide a time of sobriety to better assess if substance use is material to the disabling condition
 - Important to show in Medical Summary Report if person still has symptoms when sober and experiences functioning issues in sober and highly supportive environment
 - Jails provide a new source for medical records
 - Challenges of applicants being in jail
 - Scheduled consultative exams
 - Some jails will provide transportation to these appointments
 - Some doctors are willing to go to the jail to perform the CE
 - Not all doctors will do this
 - You can work this out by contacting the CE doctor and to see if they are willing
 - Call the DDS Examiner to have the CE rescheduled for when they are presumed to be released
 - Communication challenges with jail system
 - Some agencies are able to receive a daily jail list that shows who has been arrested and who is currently in jail
 - See if your agency can sign up
 - Contact another agency to see if they can share the list
 - Jail information is not confidential
 - Look to make contact with an inside champion within the system
 - Jail social workers make great champions
 - Some community providers work within the jail system
 - Booking sergeants and staff who check people into jail are very helpful
 - Talk up the receptionist
 - Bringing cookies or treats to staff goes a long way
 - Rapid releases and losing contact with the applicant
 - Having an inside champion can help with giving you a heads up that someone is being released
 - Remind and review with the applicant every time you see them that they should call you when they are released
 - Providing basic needs like a bus pass or access to housing when they are released may increase the likelihood that the applicant will call you
 - Appearing in court
 - Some SOAR caseworkers have found that letting a judge know that they are working with the applicant can help with getting shorter jail stays

- SOAR caseworkers have done this by working with community jail diversion programs and/or public defenders

State Hospitals

- Tips for SOAR caseworkers
 - Always let the DDS examiner know that an applicant is in the hospital
 - Shows ongoing disabling condition and impact on functioning
 - Updated medical records can be obtained for DDS
 - Develop a relationship with a person within the hospital
 - Can set up an interview room for you
 - Social work staff are key inside champions
 - You are valuable to social work staff as they plan the applicant's discharge
 - Make sure to get the medical records to DDS
 - Social workers can help to follow up on the records request
 - Request as soon as possible because they process can take awhile
 - If you go to the hospital to interview the applicant, see if they can gather the records while you are there.

Next SOAR Dialogue Call will be on July 27th at 10 AM: <http://www.ncceh.org/events/1178/>