

## SOAR Dialogue Phone Call

8/19/10

Attendance: Emily Carmody, Kristin Lupfer, Violet Collins, Spencer Cook, Aundry Freeman, Linda Mandell, Margaret Baird, Elizabeth Lumley, Kathryn Winston, Brooks Ann McKinney

### I. Introductions

- a. Name, Where from, Accomplishments with SOAR this month
  - i. Aundry Freeman- Asheville- Good meeting with SSA office this month
  - ii. Violet Collins- Pitt County- 1 person approved for SSI
  - iii. Brooks Ann McKinney- Wake County- getting community onboard with program, working on 2 cases, 2 interns joined Brooks Ann
  - iv. Spencer Cook- Durham- Productive meeting with SSA office to work out kinks
  - v. Elizabeth Lumley- Durham- Meeting with SSA office, continuing good relationship with SSA
  - vi. Kathryn Winston- Yesterday had unexpected approval, based on Medical Summary Report
- b. Kristin Lupfer from Policy Research Associates
  - i. Senior Project Associate for the SOAR TA Center
  - ii. Former director of Georgia's SOAR program
  - iii. TA provider for NC
  - iv. Accomplishment for SOAR- 13 more states onboard with SOAR this year

### II. National Perspective on SOAR

- a. Update from Kristin on current SOAR Initiatives
  - i. Policy Highlights- from work with SSI Taskforce with National Healthcare for the Homeless
    1. SSA preparing reports about open comment period for issue of materiality of drugs and alcohol to disability listings
      - a. SSA received conflicting comments
      - b. Emily to email link to comments to SOAR Dialogue Group
    2. SSA work with the USICH Plan to End Homelessness
      - a. SSA looking at how to increase/better outreach efforts which includes SOAR
      - b. SSA looking at how to make transition easier for children who receive SSI benefits
    3. Emphasizing flagging and expediting "Homeless" cases
      - a. "Transient" flag within SSA system for individuals who are "doubling up"
      - b. "Transient" flag not followed through consistently at SSA offices
    4. Advocating for training for SSA/DDS staff about working with homeless individuals
    5. Growing the number of states using SOAR Process

- a. 6 regional offices are onboard with SOAR Process
  - b. Emily clarifies that SOAR Process is the use of the initial fax form to develop a PFD and 60 day window to submit applications
  - c. Atlanta Regional Office is not onboard with SOAR Process
    - i. NC only state in region with this onboard
    - ii. SC to start using SOAR Process in September
- 6. Advocating for a "SOAR" Flag in national SSA System
  - a. Easily identifies SOAR cases in system
  - b. Going to take time to advocate for this change
- 7. Advocating for expanding the list of acceptable medical sources
  - a. Homeless individuals do not always see doctors and Ph.D. psychologists for treatment
  - b. Want to include LCSW, NP, PA signatures as medical evidence
- 8. Bill currently introduced in House to increase the resource limits for SSI applicants
  - a. Allows for applicants to have retirement accounts, savings
  - b. Would prevent individuals from having to "spend down" resources
- 9. Questions on Policy
  - a. In reference to open comments about drugs and alcohol- can comments be regulated?
    - i. Problematic when SSA gets wildly different opinions
    - ii. SSA weighs opinions of experts more heavily
  - b. Homeless Definition with SSA- would someone with a Shelter plus Care voucher be considered homeless?
    - i. Would not be considered homeless if in apartment with voucher
    - ii. Living arrangement would depend on SSA categorizing the voucher, check with the local SSA office
  - c. Can you clarify "Transient" Flag?
    - i. Created in September 2009
    - ii. Not consistently used
- ii. SOAR resources available on website (<http://www.prainc.com/soar/>)
  - 1. Information about having your agency become an Organizational Payee
  - 2. Document explaining HIPAA FAQ to medical records departments
  - 3. Information about states and local laws that mandate medical records be provided for free for disability applications
    - a. NC does not currently have these laws in place
    - b. Opportunity for advocacy in NC
  - 4. PATH/SOAR Collaborations Paper
  - 5. Issue brief about working with AmeriCorps programs
  - 6. PowerPoint available on funding and sustainability available

7. Hospital Collaboration Toolkit
  - a. PowerPoint presentation
  - b. Sample MOU
  - c. Information to provide to hospitals
8. Questions:
  - a. HRSA Grants: Is SOAR included in their expanded list of programs that can be funded?
    - i. Not specifically listed
    - ii. Can be funded through Medicaid as part of case management in some states
  - b. SOAR wants to start topical webinars – what topics would be useful to cover?
    - i. Working with hospitals
      1. Wake and New Hanover Counties are having difficulty with hospitals referring individuals to private organization for applications
      2. In Atlanta, able to make agreement with Grady Hospital to refer all homeless individuals to SOAR
    - ii. Developing relationships with SSA offices
    - iii. Educating doctors about SOAR
    - iv. Educating Caseworkers about recognizing and evaluating cognitive disabilities
    - v. Email Kristin with any other ideas ([klupfer@prainc.com](mailto:klupfer@prainc.com))
- b. National SOAR Outcomes (last year)
  - i. 3,158 Approvals
  - ii. 71% approval rating
  - iii. 89 days average decision time
- c. How NC compares with other SOAR States
  - i. Outcomes
    1. Last year: 40 approvals, 75% approval rating, 120 days
    2. This year: 108 approvals, 77% approval rating, 113 days
  - ii. Program development
    1. 13 FT dedicated SOAR caseworkers
    2. 5 PT or volunteer SOAR caseworkers
    3. 8 counties with active workgroups
    4. From 2006-2010: 29 trainings, 18 cities, 993 attendees
    5. Collaborations with hospitals, medical records departments, and training for physicians (Documenting Disabilities)
    6. SOAR Caseworker Certification- national certification that models NC system
- d. Questions:

- i. Any attorneys using SOAR in pro bono work?
    - 1. Some programs that receive funding through grants and outside sources:
      - a. Philadelphia
      - b. Milwaukee
      - c. California
    - 2. There are a lot of law school students not being hired as interns – could we develop a clinic with law interns doing SOAR applications with a supervising attorney?
      - a. Emily to speak at meeting of NC Disability Attorneys in December and propose idea in presentation
      - b. Emily to further explore this option
- III. Feedback about DDS system
  - a. Ann Griffin Hall stated that the faxing system is going well so far
  - b. Feedback from the field about new process (faxes/examiners)
    - i. More awareness in DDS about SOAR
      - 1. Aundry- DDS worker called her and stated that they would wait for records to make decision
      - 2. Kathryn- DDS worker called her and stated they would wait for the Medical Summary Report to make decision
    - ii. Please provide Emily with ongoing feedback about the DDS system using specific case information
      - 1. Do not email identifying information
      - 2. Send email to Emily about incident
      - 3. Emily will follow up with phone call
- IV. Consolidating medical record information
  - a. Group agrees would be helpful for NCCEH to compile list of medical records departments based on SOAR Caseworkers throughout the state
  - b. Please send Emily lists of contact information for medical records departments to be compiled
  - c. List will be posted on SOAR Caseworker protected pages on website
- V. Trouble shooting/Brainstorming about cases
  - a. Linda received letter that SSI was denied for applicant because Linda stated that the applicant did not want to file
    - i. Linda took applicant to SSA office to file application
    - ii. Linda believes is automatic letter generated
    - iii. Other Caseworkers had not received this type of letter
    - iv. Linda to check with local SSA office as to why she received the letter and how to avoid these letters in the future

VI. Next SOAR Dialogue Phone Call September 16<sup>th</sup>, 10 AM