

Subject: Follow-Up & Next Steps – April SOAR Dialogue Call

Hi everyone,

Thank you all for attending the **April SOAR Dialogue Call** and for your active participation and thoughtful questions.

A special thank-you to **Tyquan Carr (Pathway Community Living)** and **Emily Brown (SSA Area Work Incentive Coordinator)** for sharing their time and expertise.

Key Takeaways

From Pathway Community Living (Tyquan):

- Pathway provides **structured independent community-style housing** for:
 - Individuals on **fixed income**
 - People **experiencing homelessness**
 - People **reentering from incarceration**
- Homes are:
 - Fully furnished, with **room, board, and utilities included**
 - Located along **Alamance County transit routes** for transportation access
- Residents must be:
 - **Independent, mobile, and cognitively aware**
- Justice-involved individuals are accepted, **excluding violent physical crimes**; there are **specific homes for people on the registry**.
- Tyquan is **very involved** with residents' daily needs (e.g., transportation, ordering groceries) and maintains a **house manager on-site** at each property.
- Each home generally houses **up to 7–8 residents** to keep the environment manageable.

I will forward Tyquan's **flyer and house rules** to you all once I receive them.

From SSA (Emily Brown):

- SSA is working to improve **speed and efficiency** despite **high workload and staffing shortages**.
- Digital initiatives and process changes discussed included:
 - **Trusted Exchange Framework (TEFCA)** for faster access to medical records and reduced delays in getting medical evidence.
 - Enhancements to **Appointment Representative Services (ARS)** and **hearing scheduling (SPARK)** to reduce delays at the hearing level.

- Moving **medical CDRs** from state DDS to **federal processing sites** so DDS can focus more on **initial claims** and **reconsiderations**.
- **Paper vs. online applications:**
 - **Online applications are strongly preferred** as they reduce field office workload and speed transfer to DDS.
 - Certain forms **cannot** be accepted by fax (e.g., **SSA-8000 / SSI paper application**) due to **wet signature requirements**.
 - Other forms (e.g., **SSA-827, 3368, 3288, 1696**, etc.) **can** be faxed and are routed into SSA's electronic system.
- **Mail/Fax handling & profiling:**
 - Field offices scan all paper/fax submissions into an **online repository**, then profile each document to the correct electronic folder.
 - SSA is using a **mail centralization/barcode system** to reduce misfiled documents, but errors still occur, especially when large “packets” are scanned as one combined PDF.
 - Providers can help by **clearly separating/stapling** forms (8000, 1696, 827, etc.) so they are less likely to be grouped incorrectly.
- **Award notices & communication issues:**
 - SSA generally does **not confirm faxes** individually; follow-ups may be needed.
 - Several of you reported:
 - **Long delays** between favorable DDS decisions and SSA issuing payment/award notices.
 - **Missing award letters**, which are critical for **agency reporting and housing applications**.
 - **Missed or delayed SSA phone appointments** and **weekend calls**.
 - Emily asked that issues like these be routed through me so she can work with field office management to resolve them.

Action Items & Next Steps

- **Tyquan's Materials**
 - Once I receive Tyquan's **flyer and house rules**, I will email them out to this group.
- **Missing Award Notices**
 - If you have cases where:
 - A client has been **approved**, and/or

- A **perk appointment** has already occurred, but
- You **still haven't received a written award notice** please email me:
- Client initials
- Last 4 of SSN
- Field office
- Brief note on what's missing (e.g., "no award notice; client already receiving checks")

I will compile a list and send it to **Emily** so she can coordinate with the relevant field offices.

- **SSA-8000 Signature Requirements**

- Emily is confirming the **current e-signature/wet signature rules** for the **SSA-8000** and related disability forms.
- Once she provides clarification, I will share that guidance with all of you.

- **SSA-3288 / Response Page**

- Several of you mentioned the old **second page** attached to the **SSA-3288** that SSA could use to:
 - Confirm whether a claim is pending or was ever filed
 - Provide simple status responses
Please send me an example of that second page if you have it. I will forward it to Emily so she can:
 - Share it with field offices, and
 - Reinforce the practice of **completing and returning it** when possible.

- **Examples of Processing/Communication Problems**

- If you're seeing:
 - Consistently **long post-approval delays** (especially at specific field offices)
 - **Missed SSA phone appointments** where the client never receives a call
 - Repeated issues with documents being **misfiled or not attached** (e.g., 1696/8000 lumped into an 827) please send those **case examples** to me with:
 - Client initials and last 4 of SSN
 - Office location
 - Dates of contact and who you spoke with (if known)

- What's missing / problem observed
I'll consolidate and share these with Emily so they can be addressed through **field office follow-up and training**.

Thank you again for the work you're doing with SOAR and for your patience as we navigate these SSA process challenges together. Your questions and examples are incredibly important for driving improvements.

Best,

Natasha

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North Carolina Coalition to End Homelessness