



Terminal Illness (TERI) and Compassionate Allowances (CAL)

Last Updated September 2026



NC COALITION to end
HOMELESSNESS

SOAR News and Updates

SOAR Annual RSVP and t-shirt and lunch selections end today! I have received 46 RSVPs and only 37 lunch/tshirt submissions – REGISTRATION CONFIRMATIONS will be emailed to the group today!

Links for surveys and SORT:

For SOAR Annual RSVP Survey: [15th NC SOAR Annual Conference – Fill out form](#)

For T-shirt and Lunch Selection: [PICK YOUR meal and tshirt here!!!](#)

For SOAR Outcomes (the SORT online tool): [SORT Online Tool](#)

There will *not* be an October SOAR Dialogue Call

New SOAR Providers: Thanks for completing training, please send your QR and MSR or FAST to become SOAR Certified!!! Reach out if you need instructions or guidance or support! I have not certified one new SOAR Provider this year, that must change!



Importance of TERI and CAL

1. Some applicants have conditions where delay can have especially serious consequences
2. SSA has special processing pathways for certain priority cases
3. TERI focuses on terminal illness
4. CAL focuses on specific very severe conditions on SSA's CAL list
5. SOAR providers can help by recognizing potential cases early and clearly documenting what they know
6. Important: expedited processing does NOT eliminate the underlying SSI/SSDI eligibility or disability requirements

TERI: What Does It Mean?

TERI = Terminal Illness

- SSA defines terminal illness as a medical condition that is untreatable and expected to result in death
- SSA directs staff to identify potential TERI cases as early as possible
- A case may be identified from the claimant's allegation or from TERI descriptors/medical information
- TERI cases are expedited at each step of the disability process

Descriptors to Identify a TERI Case

- Claimant/third-party allegation that the illness is terminal
- ALS or AIDS
- Inpatient or home hospice care
- Chronic dependence on a cardiopulmonary life-sustaining device
- Awaiting certain organ or bone-marrow transplants
- Chronic pulmonary or heart failure requiring continuous home oxygen AND inability to care for personal needs
- Certain advanced cancers, including metastatic, Stage IV, persistent/recurrent after initial therapy, or inoperable/unresectable cancers
- Coma lasting 30 days or more; newborn with a lethal genetic/congenital defect
- The descriptor list is NOT all-inclusive; other conditions can qualify when the TERI definition is met

TERI Is Not A Diagnosis Made By You!

- SSA POMS specifically cautions against exposing a claimant to material that reveals a terminal-illness designation when the claimant is unaware
- If a client or reliable third party reports that the condition is terminal, ACT FAST - clearly communicate the allegation/known medical information to the appropriate SSA contact
- Use neutral, client-centered language and avoid telling a client that SSA has determined they are terminal



TERI Processing

- DDS tracks and expedites TERI cases
- DDS management should ensure quality-assurance/supervisory follow-up every 10 days until DDS completes its actions
- If DDS has not completed its actions within 30 days, the SSA FO contacts the DDS Examiner and at 60 days, the SSA FO contacts DDS management
- The TERI designation generally remains unless medical evidence establishes that the case does not meet the TERI definition
- TERI is distinct from CAL (Compassionate Allowance and Quick Disability Determinations)

CAL: What Does It Mean?

- CAL is a fast-track process for claimants with an impairment on SSA's CAL conditions list (last updated August 10, 2026 – 14 NEW IMPAIRMENTS ADDED)
- CAL conditions are very severe, typically have a poor prognosis, and are highly likely to result in an allowance
- The claimant must still be disabled under the Social Security Act and meet the applicable SSI/SSDI entitlement or eligibility requirements
- SSA evaluates CAL claims using the same sequential evaluation process; CAL accelerates identification and processing

CAL Identifiers and Processing

- SSA selection software can identify a CAL condition from the alleged impairment using the name, synonym, or abbreviation
- A CAL indicator can also be added manually after transfer when appropriate
- During the disability interview, SSA instructs staff to review the current CAL criteria
- For cancer allegations, SSA instructs staff to obtain the type and stage, if known, and record it on the disability report

TERI vs CAL

- TERI: based on terminal illness—untreatable and expected to result in death
- CAL: based on a specific impairment appearing on SSA's CAL list
- A condition may potentially fit both CAL and TERI pathways
- TERI applies to electronic AND paper cases; CAL is part of SSA's electronic fast-track processing
- Neither pathway guarantees an allowance or replaces non-medical eligibility requirements

Questions to ask during your initial interview/on SOAR Referral Form to help surface CAL/or TERI cases:

What diagnoses has the client been given?

Has a doctor ever described the condition as terminal, end-stage, metastatic, recurrent, or inoperable?

Is the client receiving hospice care?

Is the client awaiting a qualifying transplant?

Does the client have ALS or another condition known to be on the CAL list?

If cancer is present: What type? What stage? Has it spread? Is it recurrent or inoperable?

What medical providers/facilities have records documenting the diagnosis?

Is there recent evidence that clearly establishes the condition?



SOAR Provider's Best Practices

- Identify and obtain the strongest available records supporting the diagnosis and severity
- Prioritize records that establish the condition—not simply records showing that the person has appointments
- For cancer, capture type and stage when known
- Use the Medical Summary Report or SOAR Functional Assessment Statement to make the key diagnosis and supporting evidence easy to locate
- Do not label a case 'TERI' or 'CAL' as though the SOAR provider made the SSA determination; instead, describe the facts and identify the potential expedited issue
- Coordinate with the claimant's consent and applicable confidentiality requirements

Make The Priority Visible

Add this near the Intro Section: '**Potential Expedited Processing Issue**'

- State the diagnosis/condition and the source of the information
- Summarize the key evidence: diagnosis, stage/status, prognosis or treatment status when documented
- Identify where supporting records can be found
- Explain functional impact —why the condition prevents sustained work activity
- Avoid speculation! Use 'medical record documents...' or 'client reports...' when appropriate

TERI and CAL Summary

LOOK: Ask about serious, terminal, advanced, and rare diagnoses early

VERIFY: Check the current SSA CAL list and review available medical evidence

DOCUMENT: Put the diagnosis, relevant status/stage, and supporting evidence where it is easy to find

COMMUNICATE: Alert the appropriate SSA/DDS contact to potential priority processing

DON'T OVERPROMISE: TERI/CAL speeds processing; it does not guarantee eligibility or approval

PROTECT DIGNITY: Use trauma-informed, person-centered language and respect sensitive information



CAL and TERI POMS Sources

For CAL Listing: <https://secure.ssa.gov/poms.nsf/lnx/0423022080>

For TERI Listing: <https://secure.ssa.gov/poms.nsf/lnx/0423020045>

Listings and POMS can change; please review regularly to ensure you have the most up-to-date and accurate information.

Subscribe to SSA for updates: <https://www.ssa.gov/agency/updates/>

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