



Succession Planning

January 2025



NC COALITION to end
HOMELESSNESS

Updates from SSA

- Ensure you have enrolled as an Individual Representative via the [SSA-1699](#)
 - Email soar@ncceh.org if you have submitted your 1699 and not yet received your REP ID
 - If you have issues call 1-800-772-6270
- [Starting January 6, 2025](#), Social Security offices will require appointments for most in-person services, including Social Security card requests; walk-ins will still be accepted for vulnerable populations and urgent needs.
- [Beginning this month](#), Social Security benefits and Supplemental Security Income (SSI) payments increased 2.5 percent. **On average, Social Security retirement benefits will increase by about \$50 per month.**

Updates from NCCEH

- [Annual provider survey](#) was due last Friday!
- Adriana's departure :(



Succession planning for SOAR in your agencies

Communicating with the Applicant

- Meet with and explain to the applicant that you must withdraw your representation and that someone else in your, or another agency will assist them with completing their application with SSA.
 - If you are struggling with finding a new rep review the NC SOAR Active Provider list to see who may be able to accept a new client:
<https://docs.google.com/spreadsheets/d/14fIB1b9TcUu3okyJvKCCzEZHQY3zPXswnTOYLUspUgE/edit?usp=sharing>
 - If a SOAR provider or other caseworker cannot help, refer them to a lawyer. However please make sure to tell them a lawyer can indeed take a portion of their payment if awarded. Legal Aid may be a good option as they provide free assistance: <https://legalaidnc.org/get-help/>
- Provide a letter that explains the change and includes the new representative's contact information. Have the applicant sign a new SSA-1696 to appoint the new representative.
- Help the applicant schedule their next appointment with the new case worker. If possible, have a meeting with all parties to do a soft introduction / "exchange"
- Request that the applicant sign new release forms, as applicable.

Transitioning Case Materials and Status

- Fully brief the new caseworker/lawyer about the status of the application, what is still pending, and what needs further development and follow-up.
- Check the status of all medical records requests.
- Review the SOAR [quality review checklist](#) to indicate what has been completed and what needs follow-up.
- Provide all files, notes, and records.
- Introduce the new case worker to contacts for the applicant with whom you have been communicating.

Updating SSA and DDS

- Ensure application continuity by communicating all changes to the SSA and DDS contacts for each pending application.
- Send a [letter to SSA](#) withdrawing representation from the original case worker
 - Complete the [SSA-1696-SUP2](#) (Representative's Withdrawal of Acceptance of an Appointment) to officially withdraw your representation.
- Submit the new [SSA-1696](#) appointing the claimant's new representative.
- Call DDS to inform the examiner of new representation and introduce the new case worker.

Updating NCCEH

- Email soar@ncceh.org to notify State Team Lead of departure!!!
- Include leave date and contact information for new caseworker as applicable.

Transferring Cases in OAT

- For cases that have already been entered into OAT and are currently pending, there are two ways that the applications can be transferred to another case worker.

New Case Worker in the Same Agency

- [Email soaroot@prainc.com](mailto:soaroot@prainc.com) to inform them about the transfer. Include:
 - Applicant Identification number(s) (ApID#)
 - Name of original SOAR case worker
 - Name of case worker to whom the case will be transferred (they must be registered in the same agency)

New Case Worker in Different Agency

- Close out the ApID# in the original agency by indicating that there was no decision received.
 - The case will be closed and archived.
- Create a new ApID# in the new agency.

Implementing Agency Best Practices

Agencies can be prepared for unexpected staff turnover by implementing ongoing procedures to help with case continuity:

- Maintain a shared [SOAR Referral Tracking Worksheet](#).
- Hold weekly case status reporting with leadership.
- Keep case files organized and up to date with detailed progress notes.



Succession planning for Adriana's departure

What I know as of today

- I have notified SOAR National + NC SOAR providers + NC SSA + DDS partners
- I still do not have my start date for my new job so I cannot say when my last day is – I can guess by February
- NCCEH will be posting a position notice for the SOAR State Lead role likely at the end of this month. We hope to have someone hired and in place by the end of the first quarter
- Myself, Sametra + my supervisor will plan for coverage in meantime re: scheduled duties + technical assistance
- I have updated the NCCEH SOAR guide for my successor to be ready to hit the ground running with all tasks and current concerns

What does our new STL need to know?

- Look out for 1699 registration ongoing issues
- Leadership Academies 2025 attendees
- Meet with SSA+DDS liaisons
- 1696 issues are common
- 3288 issues are common

THANK YOU ALL!

I never thought in
terms of being a leader.
I thought very simply in
terms of helping people.

John Hume

BrainyQuote®



NCCEH