



SOAR Dialogue Call September 2025

Natasha Posey, NC SOAR State Lead



NC COALITION to end
HOMELESSNESS

Things to Remember

- Kenyetta Boone is the new Wake County SOAR Lead - please reach out to her if you are in Wake and need to be added to her Workgroup Meeting email list
- Charita McCollers and Rebecca Kaplan are our Durham County SOAR co-Leads - please reach out to either of them to be added to their Workgroup Meeting email list
- Orange County Partnership to End Homelessness is our lead in Orange County - please reach out to Chris Rawlinson or Heather Pack-Aponte to join
- Please ensure you are using the latest version of SSA forms
- Please submit your outcomes using the NC Outcome Reporting Tool!!!! It is critical that you submit your outcomes so that we can track successes, room for improvement and data that can be used to support funding/funding sustainability
- NCCEH will have the NC SOAR Training Model complete by the end of September and registration is set to open early October
- Thanks for RSVPing to the 14th Annual SOAR Conference - We look forward to seeing you all October 17th!!
(**Note: Registration has closed.** If you are unable to attend this year, we hope to see you next year!)





Social Security Grid Rules

What are the SSA Grid Rules?

- A tool that SSA uses that considers factors such as education, past work, age and your current work capacity given your physical and mental health impairments
 - If you are unable to do the work you have performed in the past 5 years, the GRID RULES may apply to your case if SSA determines you cannot perform other types of work (RFC - Residual Functioning Capacity) in the national economy

Medical - Vocational Profile

This formula to determine eligibility is called a medical-vocational profile because it considers work history and medical disabilities

- Some medical-vocational combinations result in an approval and some a denial
- People over the age of 50 have a greater chance of a disability finding using GRID RULES and people over 55 are even more likely to be found disabled

SSA uses the GRID RULES to make quick determinations:

- If the combination factors (age, RFC, education, work experience) match a category in the GRID RULES

Four Factors SSA Uses to Apply Grid Rules

- 1. AGE**
- 2. WORK EXPERIENCE**
- 3. EDUCATION LEVEL**
- 4. RESIDUAL FUNCTIONAL CAPACITY**



Number One: AGE

SSA defines age in the following categories:

- Younger Individual: 18-49
- Closely Approaching Advanced Age: 50-54
- Advanced Age: 55-59
- Closely Approaching Retirement Age: 60 and over



Number Two: Work Experience

Skills gained from past work are considered and categorized as:

- Unskilled, semi-skilled or skilled
- SSA has an idea that heavier duty jobs do not train workers to perform light duty tasks and sedentary jobs could make transitions to do other work

Can you think of some examples for heavy duty jobs? And light duty or sedentary jobs?

- If over 55, there must be little 'vocational adjustment' in regards to processes, tools and work settings in order to find transferable sedentary work
- If over 60, 'very little vocational adjustment' rule applies to find transferable skills or light duty
- If a person has relevant unskilled work experience, they would not have transferable skills due to the unskilled nature of the work

Can you think of examples of skilled and unskilled jobs?

Number Three: Residual Functional Capacity

RFC is the max amount of work SSA finds you able to reasonably perform given your workplace limitations of your physical and mental health disabilities combination

SSA defines work as the ability to sustain full-time, 8 hour/5 days a week SGA

Your RFC determines the GRID RULE SSA will use to determine eligibility

Number Four: Education

Education Plays a significant role in GRID RULE determinations

- Some medical-vocational profiles automatically meet the definition of disabled
 - These profiles are called *special medical-vocational profiles*
 - These *special medical-vocational profiles* always lead to a favorable decision



Special Medical-Vocational Profiles

Arduous

- Severe impairment, no past relevant work, over age 55 and marginal education (6th grade level or less)

No work experience

- Severe impairment, no past relevant work, over age 55 and limited education (7th-11th grade, no diploma or GED)

Lifetime Commitment

- Lifetime commitment (30 years or more) on an unskilled, semi-skilled or skilled but w/no transferable skills profession, cannot work due to severe impairment, have no more than a limited education and are over age 60



Five Step Sequential Evaluation

SSA uses these steps to assess every claim for SSDI benefits

1. **Are you working?**
 - a. If you are working and making over SGA (\$1620 this year) you will be denied at this step. If you are not, you move on to the next step.
2. **Is your condition severe?**
 - a. Your condition impacts your ability to perform basic work duties for at least 12 months
3. **Does your condition meet the requirements of SSA's listed impairments?**
 - a. If yes, you are approved. If no, move on to next step.
4. **Can you return to your past relevant work?**
 - a. If yes, you are denied. If no, move on to next step.
5. **Can you do any type of work in the national economy?**
 - a. SSA has to prove that there are other jobs you can perform. If they are unable to do so, you are approved. People age 50 and over are less likely to have transferable skills from past relevant work and will likely be approved

GRID RULE doesn't always apply!

Here are some exceptions to the GRID RULES that may still result in a favorable decision

- A person incapable of performing even sedentary work
- Nonexertional limitations: medical limitations that do not affect your ability to sit, stand, walk, pull or push usually caused by mental illness/hearing impairments/vision impairments and have an impact on your ability to stoop, kneel, bend or balance
- Combination of impairments: SSA considers all your impairments, mental and physical and how they impact your ability to work
- Borderline Age Situation: A claimant is days or months away from reaching a higher-age category (50, 55 or 60)



Examples of Medical-Vocational Profiles

Rule	Age	Education	Previous work experience	Decision
202.01	Advanced age	Limited or less	Unskilled or none	Disabled
202.02	Advanced age	Limited or less	Skilled or semiskilled - skills not transferable	Disabled
202.03	Advanced age	Limited or less	Skilled or semiskilled - skills transferable	Not disabled
202.04	Advanced age	High school graduate or more - does not provide for direct entry into skilled work	Unskilled or none	Disabled
202.05	Advanced age	High school graduate or more - provides for direct entry into skilled work	Unskilled or none	Not disabled
202.06	Advanced age	High school graduate or more - does not provide for direct entry into skilled work	Skilled or semiskilled - skills not transferable	Disabled
202.07	Advanced age	High school graduate or more - does not provide for direct entry into skilled work	Skilled or semiskilled - skills transferable	Not disabled
202.08	Advanced age	High school graduate or more - provides for direct entry into skilled work	Skilled or semiskilled - skills not transferable	Not disabled
202.09	Closely approaching advanced age	Illiterate	Unskilled or none	Disabled
202.10	Closely approaching advanced age	Limited or Marginal, but not Illiterate	Unskilled or none	Not disabled
202.11	Closely approaching advanced age	Limited or less	Skilled or semiskilled - skills not transferable	Not disabled

Website Citations

LaPorte, Esq., Kevin *Understanding the Social Security Grid Rules and Your Disability*. Web. 26 December 2024.

<https://www.laportelawfirm.com/blog/social-security-disability-grid-rules/>

GRID RULES CHART

<https://secure.ssa.gov/apps10/poms.NSF/lnx/0425025035>

Navigating the “Grid Rules” in Social Security Disability. Web.

<https://socialsecuritydisability.com/news-and-insights/navigating-the-grid-rules-in-social-security-disability/>



NCCEH

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