

## SOAR Dialogue Highlights 8/20/19

Attendees: Emily Carmody, Christina Heggins, Kisha White, Stacey Costner, Alicia Merrill, Natasha Posey, Andrea Merriman, Malik Kennedy, Connie Ness, Kathryn Coiner-Collier, Jessica Modra, Danielle Arthur

### Introductions

- Emily Carmody, NCCEH, Raleigh- SOAR training in Charlotte scheduled for October
- Christina Heggins, Mecklenburg County, Charlotte- no updates
- Stacey Costner, Mental Health Association of Cleveland County- no updates
- Alicia Merrill, Pisgah Legal Services, Asheville- no updates
- Natasha Posey, Southlight, Raleigh- Emily is joining the disability workgroup in September to review medical summary reports
- Andrea Merriman, Esther House, Albermarle- built relationship with SSA field office
- Malik Kennedy, DUPD-HAT, Durham- close out all cases
- Connie Ness, Southlight, Raleigh- 2 favorable decisions
- Kathryn Coiner-Collier, Atrium Health, Charlotte- cases pending
- Jessica Modra, Criminal Justice Services, Charlotte- went to hearing last week and applicant approved for benefits
- Danielle Arthur, Urban Ministry Center, Charlotte- no update

### Announcements

- SOAR Training on October 22-23 in Charlotte. Please have those interested in the training visit NCCEH's website to complete an application.
- Congratulations to Malik Kennedy who is the newest person to achieve SOAR Caseworker Certification!

### SOAR and NC DDS

#### *Overview*

NC DDS is one of the SOAR program's primary partners. Initial and Reconsideration applications are sent to NC DDS for medical determinations.

NC DDS created a document explaining how applications are processed at the agency and clarifying expectations for DDS Examiners (referred to as analysts in the document) and NC SOAR Caseworkers. On the call, NC DDS staff reviewed the document with SOAR caseworkers and answered questions. Below is a summary of the questions and answers provided during the review.

#### *Comments in reviewing the document*

- SOAR caseworkers need to be focused when talking to DDS on the phone to avoid lengthy times away from processing cases.

- Medical Summary Reports provide a lot of good information in personal history, treatment history, and functioning. However, an MSR cannot take the place of medical evidence. SOAR caseworkers need to be sure applicants have recent medical records to support their case.
- If SOAR caseworkers have issues with DDS examiners calling them back, please contact Emily to see if she can address the issues with DDS.

### *Questions*

Is SGA decided at DDS or the SSA Field Office?

- SSA field offices do determine if someone is making SGA initially, but NC DDS also does a review in case the applicant goes back to work.

Does DDS determine if the person is receiving supports at work and if that impacts SGA?

- SSA field offices deal with the values of supports and impact on SGA.

Does DDS have any control over which cases are pulled for national quality review (for example if the case is someone who is terminally ill)?

- Unfortunately, DDS has no control over what cases are pulled for national quality review.

Are reconsiderations included in average decision days?

- Yes, they are included in the average decision days. Reconsiderations are often decided more quickly because they have the majority of information already in the file. If a reconsideration is filed due to new medical evidence, DDS does wait for the new evidence before deciding. Representatives have 20 days to get new evidence in for the case.

In order to avoid making a lot of phone calls, is it OK to update the examiner through faxes?

- If they are important updates (jail, hospital, disappeared), they would warrant a phone call.

What if a barcode does not have an examiner's name on it?

- 99.9% of cases are transferred to a SOAR examiner and should have the examiner's name on the barcode letter. However, if the letter was sent by the initially assigned SOAR examiner (non-SOAR examiner), it may not have a name. If that happens, caseworkers can call Amanda Pierce or the number provided in the document.

In light of the new policy around obesity, how is DDS changing their analysis of those cases?

- DDS training department is working on training examiners. DDS can provide an update to SOAR caseworkers once that is done.

Next SOAR Dialogue Call will be September 17th at 10 AM: <https://www.ncceh.org/events/1355/>