

## SOAR DIALOGUE CALL 2/18/20

### Intros and Updates

Natasha Posey- Southlight, hired new SOAR specialist

Pamalia Davis- VOA, no updates

Shentelle Livan- WakeMed, 2 potential SOAR cases

Rex Mercer, Orange County DSS, no updates

Linda Thomas- Local Re-entry in Wilmington, no updates

Kathy Walker- Pisgah Legal, no updates

Connie Ness- volunteering in Raleigh

### Announcements

-DDS new leadership:

Effective Monday, February 17 **Angela Herron** will be the temporary assigned point person for SOAR reps to fax regarding their incoming SOAR claims. The fax number will remain the same at 800-804-5509. Faxes will now go to the attention of Angela.

Angela can be reached by phone at 800-443-9360 x2746 and email at [Angela.Herron@ssa.gov](mailto:Angela.Herron@ssa.gov). She is a prior SOAR examiner with a good knowledge about the program and expectations.

Please alert SOAR reps of this change in contact. **Also, please direct SOAR reps to now contact our Disability Call Center at 866-542-8113 for status on claims and the names of their examiners. When they call they will need to identify themselves as SOAR Reps.** The volume of status calls/emails from SOAR reps can be handled more efficiently this way as we transition workloads in PRO.

-New SOAR training  
Rocky Mount 4/1-4/2

## MSRs

Getting current treatment provider to sign:

challenging as typically little historical rapport with medical providers

Helps when we can use internal medical provider to get records, building relationships with charge nurse may be helpful

Worries re liability from providers- explaining that info in record is true, does not mean will get approved for benefits

Employment history:

Clients have impaired memory, poor historians,

prior employers often do not feel comfortable giving past history

Wage history is not detailed, lists parent company

Can request wage history from SOAR rep at local office

Substance use:

Documents from local agencies vary a lot, encourage clients to share they are applying for disability

Worry that SSA will think that we are asking providers to change documentation

Notes cut and paste with little context

Provide training for medical providers re documentation

Mental health history:

Connect to symptoms in part A of listing

Helpful to use NCCEH MSR Scorecard

Overwhelming for new SOAR caseworkers

Medical terminology sheet would be helpful

Functioning impairment:

Connect back to symptoms from the listing

Very hefty, meat and potatoes of everything

Use observation notes in records, as well as own observations

Give clients "assignments" and ask why they were not able to complete to hear functioning impairments in their own words

## Open Questions/Tips

Pisgah Legal: believe short cover letter is required if caseworkers are submitting documents that were solicited from medical providers or if asking medical providers to sign MSR

From POMS: [https://www.ssa.gov/OP\\_Home/cfr20/404/404-1740.htm](https://www.ssa.gov/OP_Home/cfr20/404/404-1740.htm)

(5) Disclose in writing, at the time a medical or vocational opinion is submitted to us or as soon as the representative is aware of the submission to us, if:

(i) The representative's employee or any individual contracting with the representative drafted, prepared, or issued the medical or vocational opinion; or

(ii) The representative referred or suggested that the claimant seek an examination from, treatment by, or the assistance of, the individual providing opinion evidence.