

SOAR DIALOGUE CALL 3/17/20

Intros and Updates

Pamela Bowers- Charlotte, new SOAR caseworker

Pamalia Davis- Durham, one withdrawal and 2 referrals

Monica Lee- Raleigh

Shentelle Livan- WakeMed

Rex Mercer-Orange County

Danielle Arthur- Charlotte

Connie Ness- Raleigh

Nyasha Pettway- Charlotte, working on silver certification (attained Bronze recently),
Christina SOAR certified, and 4 personal approvals in 2020

Susan Orfanedes- High Point, new case

Christina Heggins- Charlotte

Melissa Zhiss- Charlotte

Announcements

DDS- operating as normal thus far, please continue to call them for case updates

SSA- all FOs closed effective today, caseworkers should mail in forms that require wet signature (postmark date will be considered date of receipt)

Sarah working remotely until at least April 10th but still available by phone, video call, and email

COVID-19

Not affecting much in Charlotte in terms of appointments but some caseworkers cannot fully transport folks- medical providers still responsive

Some caseworkers not able to have contact with clients, not able to get clients into ALFs or other placements

Workarounds for client contact- getting in touch remotely, dropping off case packages

Other resources are hard to get right now like food pantry, may be drive through options available in some counties

TERI/CAL/PD

Focus on medical records that prove the condition (for example pathology reports for cancer) since these cases may be extremely expedited

Relationship with liaison helpful- both in terms of getting language correct and in terms of advocating for applicant's case to be in these programs

Terminal Illness (TERI)

Terminal illness cases (TERI) are those that are **expected to result in the applicant's imminent death**. An applicant doesn't have to state on the application that the illness is terminal for it to be expedited under the TERI program. A field office representative or a claims examiner at the DDS can send a claim into the TERI program **when a doctor or collateral source states that that the illness is expected to result in death or when the claimant is receiving inpatient hospice care or home hospice care**. In addition, if the applicant has applied for disability on account of **ALS, (i.e. Lou Gehrig's Disease), or AIDS**, the case is brought into the TERI system.

The following are some medical conditions that are eligible for TERI treatment, but this list is not exhaustive; any terminal illness can qualify for TERI expedited processing.

- Cancer that is metastatic, Stage IV, recurrent following therapy, or inoperable
- Cancer of the esophagus, liver, pancreas, gallbladder, or brain
- Dependence on a cardiopulmonary life-sustaining device
- Chronic heart failure or pulmonary failure, requiring continuous oxygen and caregivers.
- Comatose for 30 days or more
- Newborn with a fatal genetic or congenital defect
- Awaiting a liver, lung, heart, or bone marrow transplant

The disability examiner at DDS must consult with a medical consultant before making a TERI determination, as with any regular disability case.

Compassionate Allowances (CAL)

The Compassionate Allowances (CAL) initiative is used to quickly identify and process claims for applicants with **diseases and other medical conditions that invariably qualify under the Listing of**

Impairments based on minimal objective medical information. There are over 200 conditions that qualify under the CAL initiative. The current list of CAL conditions can be found on SSA's [website](#).

There is no special application or form that is unique to the CAL initiative and it is not a separate program from SSA's two disability programs, SSI and SSDI. Individuals with a CAL condition apply for benefits using the standard SSA process for filing claims for disability benefits and SSA will expedite the applications of those with a CAL condition.

Presumptive Disability (PD)

Presumptive disability payments are designed to provide support for SSI applicants while SSA processes the disability claim for allegations that are "presumed" to be an allowance. An applicant can receive payments for up to 6 months while the Disability Determination Services (DDS) reviews the claim and makes the final decision. SSA's decision to grant PD payments is based on the severity of the applicant's conditions and the likelihood that the applicant will be approved. Financial need is not considered in presumptive decisions.

An applicant may be eligible for a presumptive decision and begin receiving SSI payments for conditions including (but not limited to) terminal illnesses with life expectancy of 6 months or less, amputation of legs at the hip, total blindness, severe mental deficiency (in cases where the claimant is unable to apply on their own and is at least 7 years of age), Lou Gehrig's disease (ALS), end stage renal disease requiring dialysis, and Down Syndrome. SSA will not require the applicant to repay PD payments, even if the application is denied at final decision and the applicant is found not to be disabled. Most PD decisions are made at the SSA field office, however, DDS has the ability to recommend presumptive payments in some circumstances.

Open Questions/Tips

Caseworkers to send info to Sarah if they hear new or different information from SSA FO liaisons