



NC Disability Determination Services

SOAR Assignment and Case Processing

Angela Herron, Professional Relations Officer
Nick Esposito, SOAR Disability Analyst

SOAR CASES AT DDS

- Fax the claimant's full name and SS# on letterhead to Angela Herron in PRO, **1.833.441.1045**
- Faxes should **ONLY** be sent on claims that have already been submitted to SSA
- The 1696 must be in file for the case to be designated as SOAR **AND** transferred to a designated SOAR examiner
- A case must be transferred to a SOAR examiner generally within **5 business days of receipt**
- PRO **CANNOT** accept the 1696 or Medical Records
- SOAR cases are checked at least twice a week for three months



General Questions

- How do I check the status of the case or the status of the 1696?
***Call the NC DDS Call Center at 866-542.8113**
- How do I find out who my caseworker is?
***Call the NC DDS Call Center at 866-542-8113**
- How long does it take to receive a barcode?
 - Up to one week
- How do I submit records?
 - Fax server or ERE website (with barcode)



HELPFUL REMINDERS

- Please submit a fax for **RECON** cases
- When submitting medical records using the barcode, **please use ONE barcode FOR EACH medical source** (versus sending one large batch)
- Please submit the **ADL form and the 3rd Party ADL form** for **EACH** claimant
- Please return examiner voicemails AND respond to ALL call-in letters

HELPFUL REMINDERS (CONT)

- NC DDS email is **NOT** encrypted neither sent nor received so please be mindful of PII when emailing
- NC DDS Staff does **NOT** have access to Zix mail and does **NOT** have the ability to open emails sent via Zix mail
- PRO eFax Number to send SOAR requests and communication:
1.833.441.1045
- NC DDS does **NOT** have the authority to accept or submit the 1696-Appointment of Representation form

PROCESSING A SOAR DISABILITY CASE

TALKING POINTS

- **Medical Records**

- When to submit

- SOAR examiners contacting SOAR Reps for jail records, recent CE from the community, etc.

- If SOAR Reps already have MER for a specific source, please include in Section 11-Remarks on the SSA-3368 (application)

- (3368) Section 11 - Remarks**

- Please write any additional information you did not give in earlier parts of this report. If you did not have enough space in the sections of this report to write the requested information, please use this space to tell us the additional information requested in those sections. Be sure to show the section to which you are referring.

- **Need for Consultative Examinations**

- Saturday appointments

- CE source(s) on the bus line

- **Job Listings/Occubrowse** (last updated)

SOAR CASE ADJUDICATOR HELPFUL REMINDERS

- Telehealth exams
 - We're often able to get telehealth exams more quickly than in-person exams
 - It would be helpful if SOAR reps can assist with telehealth exams
- Function
 - Please supply a 3rd party function report
 - Information from a friend or family member is helpful

SOAR CASE ADJUDICATOR HELPFUL REMINDERS(CONT)

- Medical Summary Reports
 - Please focus on function and only highlight important aspects of the medical history
 - Inpatient stays, surgeries, etc.
- Work History – SSA-3369
 - SSA recently reduced the relevant work history from 15 to 5 years
 - A complete and detailed SSA-3369 is necessary
- The greatest benefit of your time is to supply functional information and a detailed work history.

Questions?

Angela Herron

Professional Relations Officer

Phone: 800-443-9360 x2746

Fax: 833.441.1045

Angela.herron@ssa.gov

