

## SOAR Dialogue Highlights 5/15/18

Attendees: Emily Carmody, Natasha Posey, Malik Kennedy, Pamalia Davis, Monique Venning, Connie Ness, Stacey Costner, Charlene Meyers, Danielle Arthur, Kathryn Coiner-Collier

### Introductions

- Emily Carmody, NCCEH, Raleigh- Next SOAR training on May 22-23, 2018 in Greensboro, looking forward to the June Dialogue call where we will have a nurse practitioner on to answer questions
- Natasha Posey, Southlight, Raleigh- no updates
- Malik Kennedy, Duke University, Durham- Malik recently received Duke's Presidential Award recognizing his work to help people experiencing homelessness on campus
- Pamalia Davis, Housing for New Hope, Durham- no updates on cases, had a good conversation with doctors at Lincoln Health Center about CE evaluation
- Monique Venning, Urban Ministry Center, Charlotte- new to SOAR in NC, first case today after completing overview with Emily
- Connie Ness, WakeMed PATH team, Raleigh- team is just starting outreach
- Stacey Costner, Mental Health Association, Cleveland County- community is referring a lot of people for SOAR, working on improving MSRs, seeing a lot of younger referrals
- Charlene Meyers, CIT Program, Johnston County Mental Health Center- working on one SOAR case and have a good response from local SSA
- Danielle Arthur, Urban Ministry Center, Charlotte- no updates
- Kathryn Coiner-Collier, Atrium Health, Charlotte- no updates, have a few applications pending

### Announcements

Submit Outcomes-

- Please remember to submit outcome forms to Emily once a decision is made on a SOAR case.
- June 30<sup>th</sup> marks the end of the program year and all outcomes need to be in by then to be counted for the annual report

### Engaging Your Local SSA Field Office

*Overview*

SOAR caseworkers need a strong relationship with their local field offices to obtain information about applicants, submit SOAR applications, and process applications in a timely way. While SSA field offices operate under the same policies, they may operate slightly differently with SOAR caseworkers. It is important for newly-trained caseworkers to get to know their SSA field office's SOAR contact and understand how they would prefer cases to be submitted. Experienced SOAR caseworkers need to have ongoing conversations with their local SSA field offices to address issues that come up with the SOAR process and individual cases.

### *Current Relationships with SSA Field Offices*

SOAR caseworkers share about their current relationships with local SSA field offices.

- Raleigh- SOAR point of contact is helpful, and the office manager is responsive to issues and relaying messages to staff, do have issues with other staff who are not aware of SOAR and pass caseworkers around on voicemails
- Durham- SOAR contact is good but only there 3 days a week which can lead to longer processing times, faxes returned quickly
- Johnston County- Getting to know the office, they are not as busy so don't have to call far ahead to schedule appointments, SOAR contact is the manager and won't handle the cases

### *Common Challenges with SSA Field Offices*

SOAR caseworkers discuss common challenges they face with SSA field offices.

- Majority of the staff does not know about SOAR applications or the SOAR process so may receive incorrect or inaccurate information
- Challenges with processing applications which leads to extended timelines on cases. Common issues:
  - Not responsive to applications
  - Applications get lost or staff is out so case does not move
  - Paperwork is not entered correctly (i.e. 1696 Rep form not submitted into system)
- As staff turn over happens, SOAR caseworkers need to re-engage with new staff. Leads to needing ongoing training.
- Claims Representatives not following recommendations for payee assignment.

### *Tips for Engaging SSA Field Offices*

- Ask for a conversation with your SOAR contact if you sense that there is an issue or misunderstanding. Come to the conversation with the understanding that you are both trying to serve people in crisis
- Invite SSA staff to monthly SOAR caseworker meetings if you have one in your community.
  - Allows SSA field office to speak to all SOAR-trained caseworkers at once.
  - Caseworkers can provide feedback together if there are ongoing issues
  - Allows all SOAR caseworkers to develop rapport with the office.
  - SSA staff will not be able to attend all meetings but can come once or twice a year.
- If there is not a meeting to invite SSA staff to, SOAR caseworkers in a community can request a joint meeting with SSA field office staff.
  - Meetings either happen in morning prior to opening or at times when closed
  - Review the SOAR process to make sure everyone is on the same page and see if SSA has instructions for their office.
  - Offer to do trainings about homelessness and/or SOAR for field office staff
  - If you have an issue to address with SSA, be sure to have specific cases to refer to including dates for case processing and the claimant's name and SSN.

- As particular issues come up with cases, be sure to address them with the SSA field office in a timely way so that the Claims Reps have an opportunity to fix the problem before a decision is reached.
- If your attempts to engage your local field office do not work or if you run into resistance from the office, contact Emily Carmody for assistance at [soar@ncceh.org](mailto:soar@ncceh.org)

Next SOAR Dialogue Call will be June 19<sup>th</sup>: <http://www.ncceh.org/events/1289/>