

Attending: Suzanne Hitt, Carmen Johnson, Joe Polich, Megan Raymond, Corey Root, Diiv Sternman, Patrick Tiernan, Debra Vestal

PRESENTATION

Patrick Tiernan, Claims Specialist, Durham Office, Social Security Administration came to talk with the group about working with SSI/SSDI benefits. Durham SSA Office has a dedicated SOAR worker who deals with all SOAR cases; Patrick's role is answering questions from Durham SOAR workers. Working with SSI/SSDI benefits is complicated – the stipulations depend on which benefit a person has. Patrick passed out printed materials and answered questions from the group.

Question: For clients with SSI who are not capable fulltime work but can work 10 or so hours per week and they will not make more than SGA – is it true they are more likely to be audited and lose their benefits?

Answer: No, but if there are earnings that show up that are unreported there can be adjustments to checks. SSA does want people to work, it's great for people to contact SSA once they are hired and have an estimate of how much they will be making. There is a two month lag time between the start of employment and when checks are adjusted, but not a good idea to wait many months before reporting income. SSA has an algorithm that triggers a review, flagging folks who have moved, have worked, have a spouse, etc. SSA also tries to review files each year. Also SSA has a mobile app where people can *update SSA on wages and this calculates check adjustments automatically.*

Question: When a client loses their job, how long does it take to adjust check back to full amount?

Answer: There is a two month lag time between changes in income changes and changes in benefit amounts.

Question: If person only works for a few weeks, starting July 1 how does this affect checks?

Answer: July & August – full check; September – reduced check; October – full check returns

Question: What is IRWE?

Answer: Individual Related Work Expenses – these are not common. One example - for folks who are blind who need transport to and from work, IRWE can be deducted from the amount that can be earned.

Question: What are tips for successfully setting up at PASS?

Answer: Does not go through the SSA Office in Durham, there is a PASS Coordinator in Raleigh. They are not common.

Question: What about Medicaid continuing when someone with SSI starts to work?

Answer: At \$1500 gross income per month, the cash benefits stop but income can go up to \$2400 per month and the person can continue to receive Medicaid. If SSI stops, the Medicaid also stops.

Question: What are the different ways people can report changes in income?

Answer: Toll free phone number 1-800-772-1213, or mobile app, or bring paystubs to Durham SSA Office. Patrick recommends inputting information themselves via the app or phone system, afterwards SSA will send confirmation by mail and calculate payment changes automatically, not have manual calculations by humans in the office. More online services are coming. Usually this would be the claimant to report via phone, not a caseworker or representative payee. Can also send information by mail – this is usually efficient.

Question: Any specific info for SOAR caseworkers to keep in mind?

Answer: Best to do as much as possible online - disability app, medical disability report, and work history. The more you can do online the better – this establishes the protective filing date. Having medical evidence is not necessarily a priority, getting the work report in is important.

2018 GOALS DASHBOARD

Outcomes Submitted; GOAL: 10		Decision Days; GOAL: 100		Approval Rate; GOAL: 80+%		Referrals Made		Initial Interview		Case started	
This month	YTD	This month	YTD	This month	YTD	This month	YTD	This month	YTD	This month	YTD
1	3	N/A	52	0%	0%						

DISCUSSION TOPICS

Coordinating referrals

- Current process
 - UNC can take up to 3 referrals at a time
 - Carmen taking 2 cases from the referral pool per month - 1 will be the highest person on the HOME list at the time Carmen is ready to take a new case; 1 will be someone with an easier case, whether or not they are on the HOME list or their position on the HOME list
 - Referral form sent to Carmen, SOAR criteria added to HOME list
- Review of process, tweaks



Orange SOAR Collaborative

Meeting Notes, July 12, 2018, 3:30-4:30 pm
Southern Human Services Center, Room D

- DSS not able to coordinate SOAR referrals for the community because of confidentiality and workload

SOAR Community certification & other action items - GOAL: achieve Bronze certification by August 31

- Review [certification dashboard](#)
- Meeting at UNC Hospital
- SOAR agency MOU
- Update re: pitch from commitment from local agencies
- Carmen becoming SOAR Certified

Troubleshooting for SOAR caseworkers

FUTURE MEETINGS

Next meeting: August 9

Remaining 2018 meetings: Sep. 13, Oct. 11, Nov. 8, Dec. 13