

Completing Quality SOAR (SSI/SSDI Outreach, Access, and Recovery) Applications: Using Medical Records and Listings for Quick Decisions! June 27, 2018

Substance Abuse and Mental Health Services Administration
(SAMHSA) SOAR Technical Assistance Center
Policy Research Associates, Inc.
U.S. Department of Health and Human Services



DISCLAIMER

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WEBINAR INSTRUCTIONS

- Muting
- Recording availability
- Downloading documents
- Questions and Answers

AGENDA

Optimizing Medical Records Collection and Electronic Submission to DDS (Division of Disability Determination Services) for Quick Decisions

- Jennifer Forde, DDS QA (Quality Assurance) Reviewer, Disability Determination Division (DDD), Washington, DC

Miriam's Kitchen Secret SOAR Sauce to Success!

- Kate Baasch, MA ATR-BC, LPC, Senior Clinical Case Manager, Miriam's Kitchen, Washington, DC
- Angela Owczarek, Senior Case Manager, Miriam's Kitchen, Washington, DC

Questions and Answers

- Facilitated by the SAMHSA SOAR TA Center

Welcome!

Robert Grace
Public Health Advisor
Homeless Programs Branch
Center for Mental Health Services
Substance Abuse and Mental Health Services Administration

June 27, 2018



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What Makes SOAR **Unique?**

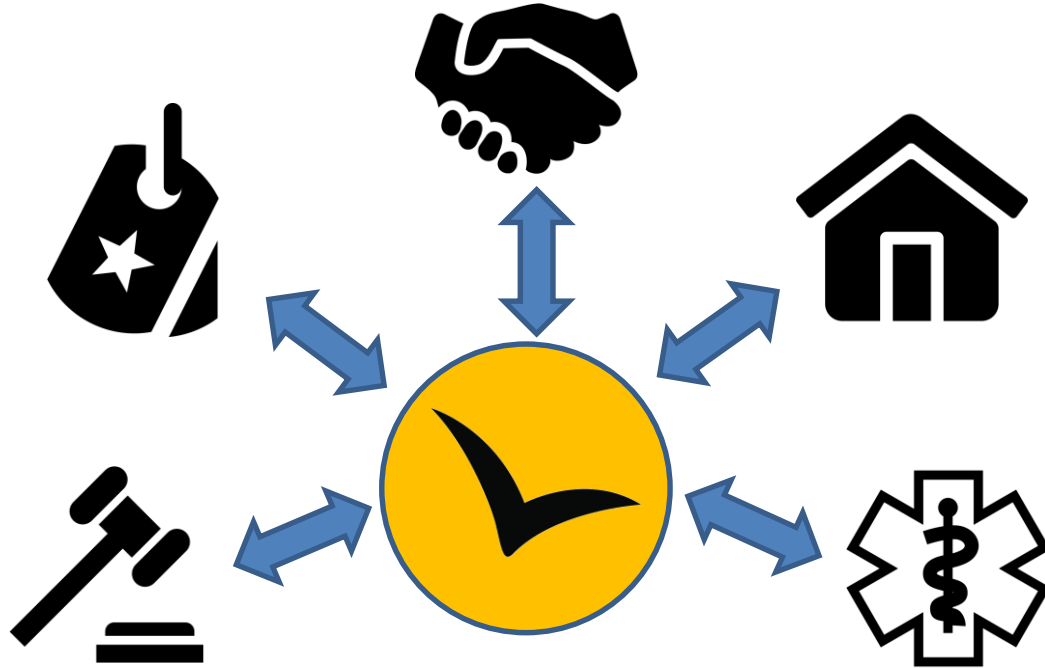
SOAR-trained case
workers are the
heroes!



SOAR **WORKS** CRITICAL COMPONENTS



Community Collaborations



SOAR Critical Components: Medical Records Collection and Electronic Submission to DDS for Quick Decisions

Jennifer Forde
DDS QA Reviewer
Washington, DC

June 27, 2018



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SSA Disability Defined

The Social Security Administration (SSA) considers a claimant disabled:

- if he or she has a medically determinable physical or mental impairment (or combination of impairments);
- that prevents him or her from doing any substantial gainful activity (SGA), and;
- has lasted or is expected to last for a continuous period of at least 12 months, or is expected to result in death

<https://www.ssa.gov/disability/professionals/bluebook/general-info.htm>

The Listings

- There are some medically determinable physical and mental impairments, called Listings, where if the evidence in file supports the allegations, the claimant is found disabled.
 - <https://www.ssa.gov/disability/professionals/bluebook/AdultListings.htm>
 - A medically determinable impairment is defined as an impairment that results from anatomical, physiological, or psychological abnormalities that can be shown by medically acceptable clinical and laboratory diagnostic techniques.
 - The medical evidence must establish that an individual has a physical or mental impairment; a statement about the individual's symptoms is not enough.

Medical Records Are Critical to the Disability Evaluation Process!

- They function to:
 - Determine if the claimant's allegations of disability meet SSA criteria
 - Document the duration and severity of the claimant's allegations

How to Register for ERE:

1. Contact the State Agency Sponsor – Usually the Office Medical Relations/Professional Relations Officer
2. Provide a Username and a Primary Email Address

Electronic Records Express (ERE)

Benefits of ERE:

- No Snail Mail - The request for medical records goes to the primary email provided. This saves time and money!
- Rapid Receipt of Medical Records – The uploaded medical records is quickly associated with the claimant's case!

Case Development Tips

Medical Records are critical to quick case decisions!

- Any medical records you can provide helps. A few more things to keep in mind:
 - Including a SSA-1696 in file to document the claimant has a SOAR representative
 - Timely and thorough completion of any forms sent to the claimant
 - Providing accurate contact information for the claimant to the DDS
 - Informing the Disability Examiner of any additional medical treatment sources
 - Attending any Consultative Examinations (CE's) scheduled for the claimant

SOAR Case Processing at the DC DDD

- Email or phone the office SOAR contact
 - When the case is initially transferred to the DC DDD- this makes case assignment to the SOAR unit possible
 - If there is any question about which Disability Examiner has the case, then contact information can be provided for the Disability Examiner and his/her Supervisor as needed

Miriam's Kitchen "Secret Sauce" for Efficiently Organizing and Submitting Medical Records to DDS

Kate Baasch and Angela Owczarek
Miriam's Kitchen
Washington, DC

June 27, 2018



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SOAR Success!

- Organized medical records
- Cross-referenced with appropriate Listing
- Submitted Medical Records via Electronic Records Express (ERE)
- <https://soarworks.prainc.com/content/dd-s-approval-4-hours>



A DDS Approval in 4 Hours!

By [SOAR Voices Blog Contributor](#)

May 22, 2018

By Kate Baasch, M.A., ATR-BC, L.P.C., Senior Case Manager & Art Therapist at Miriam's Kitchen in Washington, D.C.

[Miriam's Kitchen](#) is thrilled to share this recent SOAR success. Disability Determination Services (DDS) decided a Supplemental Security Income (SSI) claim for us in 4 hours and the number of days from application submission to decision was 35! Here's how it happened:

Relationship and Collaboration with DDS

- Structure of Relationship
- Introduction and Establishment of Relationship
- What the Collaboration looks like for us
- Trust-building

Relationship and Collaboration with DDS

- Reliance on “organized” records
 - Review for chronology, categorize by focus of symptoms/presenting problems
- Using ERE for quicker DDS processing
 - Redacted ERE example

Redacted ERE Example

- How it works
- Why it is important

2/5/2018 Step 3 of 3, ERE: Send Individual Response, Social Security

Social Security
The Official Website of the U.S. Social Security Administration

ERE: Send Individual Response

1. Destination Information
2. Review & Add Files
3. Confirmation

Thank you for your submission
Individual Response Submission - Tracking Information
Tracking Number: - - - - -
Submitted on: 02/05/2018 at 01:44 PM EST
Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

User Resources

Submission Summary
Tracking Information

Destination and Request Information

Destination: DC - Washington D.C. DDS [S11]
SSN:
ROID:
RF: D or Blank
DR: S
CS: 6dd9
Document Type: Medical Evidence of Record (MER) - 0001

Uploaded File(s)

File Name	File Size
GWU Testing and ER 03.2017.pdf	25248 KB
GWU ER 01.2017 - SOB.pdf	1499 KB
GWU ER 11.2016-12.2016 - BDs.pdf	6078 KB
GWU ER 08.2012 - Aches and Pains.pdf	1679 KB
GWU ER 2011 and ER 2007 - SOB.pdf	11909 KB
Total File Size	46,413 KB

Comments: Comments were added

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Please type your question into the Q&A box on the right of your screen.

Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

SAMHSA SOAR TA Center

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