

# NM SOAR NEWSLETTER

Issue 4

April 2011

Dear Friends,

Several weeks ago, over twenty SOAR representatives who are actively working on SOAR applications gathered in Albuquerque for a SOAR “refresher” training. We had SOAR reps from Albuquerque, Santa Fe, Las Cruces, Las Vegas and Farmington attend. The training was led by Deborah Dennis and Kristen Lupfer from PRA, which is the organization that provides technical assistance to communities and states across the country that are implementing SOAR. Dana Dominguez from

DDS and Annabell Silva from the Albuquerque SSA also attended.

It was a dynamic and challenging training, where SOAR reps were able to express their concerns and challenges, ask questions, and problem-solve with each other. For us, as the SOAR Co-Chairs, it was incredibly helpful to listen to the perspectives and experiences of those trying to do SOAR applications. We left the training with a much clearer picture of what we can do to support the work of SOAR reps, including producing a monthly newsletter. Future newsletters will high-

light other activities the Steering Committee has undertaken to support SOAR implementation, answer frequently asked questions, and highlight the successes of SOAR reps across the state.

*Sincerely,*

*SOAR Steering Committee Co-Chairs*

*Lisa Huwal*

*NM Coalition to End Homelessness*

*Patrick Halsmer*

*NM Human Services Department*

## **Mesilla Valley Community of Hope Receives SOAR Funding From City of Las Cruces**

In 2010, the Mesilla Valley Community of Hope (MVCH) received \$20,000 from the City of Las Cruces. MVCH is the first community-based nonprofit organization in New Mexico that has received funding specifically to do SOAR applications. MVCH hopes to receive additional funding in the coming year to continue the program.

Sue Campbell, who is a case manager at MVCH, has been doing the SOAR applications nearly full-time since Las Cruces awarded the funding.

To date, Sue has had four approvals and one denial, while twelve applications are still pending.

Sue has found one of the biggest challenges to be getting medical records from detention centers and prisons. Another challenge has been that many clients for whom she starts a SOAR application disappear before she is able to complete the application.

However, there are also many elements in place that have helped Sue succeed. One key to her success has been MVCH’s relationship with a

local doctor, who helps Sue put together the Medical Summary Report and who co-signs the Medical Summary Report. Sue has also built relationships with the local hospitals and medical centers and as a result is able to easily obtain medical records from them.

Sue also reports that Betsy Huber, the SOAR liaison in the Las Cruces Social Security office, has also been extremely helpful.

## The Function Report: When to Do & When Not To

One of the issues that came up at the SOAR “refresher” training was when to do the Function Report, also known as Form 3373.

The Function Report is not required for a SOAR application. In other words, when you hand over a complete SOAR SSI/SSDI application to Social Security, it does **not** need to include the Function Report.

**However**, if DDS reviews your Medical Summary Report (MSR) and finds that it does not contain sufficient information, DDS can then request a Function Report.

One of the reasons that there is some confusion about whether the Function Report is required has to do with some automatic processes at DDS. When DDS

staff receive a SSI/SSDI application, they will often automatically send out a request for the Function Report, *even if* it’s a SOAR application or the Function Report is already included.

If this happens to you, the best thing to do is to contact the DDS adjudicator and explain that this is a SOAR application. Ask the adjudicator if he/she has reviewed the MSR yet and if his/her request was just an automatic request or because the MSR is insufficient.

With all this said—and just to make it a little more confusing—we actually encourage SOAR reps to consider doing the Function Report. The reason is because some SOAR reps find the Function Report to be

a very useful tool for obtaining information from their clients for their Medical Summary Report. In other words, some SOAR reps find that doing the Function Report can help them write a better Medical Summary Report.

### Question about your Medical Summary Report?

Kristin Lupfer from PRA (which is the organization that helps communities across the country implement SOAR) can review a draft of your Medical Summary Report and provide feedback. We encourage you to take her up on her offer! You can email your Medical Summary Report to Kristin at [klupfer@prainc.com](mailto:klupfer@prainc.com). Don’t forget to redact any identifying information before sending your MSR to Kristin.

## New Mexico To Begin Tracking SOAR Outcomes

One of the reasons SOAR has been so successful at the national level is because PRA—the organization responsible for helping local communities and states implement SOAR—have been diligent about tracking outcomes. PRA can show that nationally 73% of SOAR applications get approved on the initial decision and that these are approved within an average of 91 days.

We need to show the same sort of results in New Mexico, especially if we want to secure private and public sector funding for SOAR positions. PRA has developed a software program as well as a paper form to help individual SOAR reps track their outcomes for each of the SOAR cases.

Starting this month, Patrick Halsmer will be contacting SOAR reps to ask them to start using the SOAR Data Tracking Program or the paper form. He’ll be asking each SOAR rep to submit an extract report or the paper forms to him each month, which will allow us to calculate statewide outcomes.

Doing so is absolutely critical to the future success of SOAR. Without the numbers, we cannot demonstrate that SOAR is working here in our state.