



*SOARing Together*

Series 1: Letter 1 2020

Establishing relationship with local field office

Hello SOAR Ohio Team,

Happy Thanksgiving!!

One of the first and perhaps most beneficial things you can do as a specialist, is to build a relationship with your local field office contact. Having that connection with at least one SSA worker will be helpful not only to you as claim representative but, even in the bigger picture, for the client. Each specialist should have received the contact information of the SSA staff for your county/area after you had completed the SOAR Ohio training. If you do not have this info, please contact me and I will email that to you.

When first connecting with field office, introduce yourself, tell where your claims will be coming from and what type of clients you work with, remind them you may be new to this and will have questions; ask what they are comfortable with for getting information back and forth either calls, emails; in person when allowed. Ask if you can set a certain and regular time to meet to ask questions, submit claims, get work history, check on past applications or denials, anything that may help you complete the application for an approval the first time.

Do not hesitate to tell them you do not know or understand something. Just as *hopefully* most of us love talking about SOAR, most SSA workers love to talk about Social Security! Once you have a good rapport with SS worker, you will find they are of great help to you. One very big **NO-NO**, never ever give anyone your worker's contact information. You will never have a friend again in SS! Over the years as a specialist, I have come across a few field offices that were, let's say not so accommodating, remember "kindness kills". Try your best to win them over as best as possible. If you still feel there are some unresolvable issues, contact the manager of that office or reach out to me. In some cases, it could just be a matter of the office manager scheduling a set time for your worker to do nothing but SOAR related work. Trust me, having a SSA contact in your corner makes for smooth sailing...or SOARing in our case!!!

Bonus: I enclosed a helpful recourse for SOAR applicants during COVID.

SOARing Together,  
Candace



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