

Best Practices for Implementing State and Local SSI/SSDI Outreach Initiatives for People Experiencing Homelessness

1. **Establish leads.** Identify state and local leadership and establish a steering committee.
2. **Identify existing resources.** Identify programs/staff that are currently assisting individuals experiencing or at-risk of homelessness with Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) applications.
 - What are your existing resources?
 - How are you currently assisting with benefits acquisition?
 - What is your success rate?
 - What needs to be changed?
3. **Introduce SOAR.** Identify agencies that will participate in your SOAR project and get their buy-in. Engage agency administrators so they understand the purpose and benefits of SOAR. Establish a pilot site and create an action plan.
4. **Collaborate.** Negotiate a specific referral process with the Social Security Administration (SSA) and Disability Determination Services (DDS) so that expectations and commitments are clear (c.f., *Best Practices for Collaborating with SSA and DDS on SSI Outreach for People Experiencing Homelessness*). Establish a process to obtain medical records from providers that treat people who are homeless in the community. Identify staff who can be fully or partially dedicated to assisting with benefits applications. Realign or combine existing resources, identify new funds. Is there an opportunity to benefit from retroactive recovery of uncompensated care?
5. **Train and support staff that assist SSI/SSDI applicants.** Have staff complete SOAR training, either online or in person. Identify mentors who can assist new trainees with their first few applications. Inform trainees of the expectations for participation in SOAR in your state and any state-specific processes. Establish mechanisms for on-going communication and support, i.e. refresher trainings, conference calls, newsletters, monthly meetings of trainees, SSA and DDS.
6. **Quality review.** Ensure that applications submitted to SSA are complete and high quality. Use the SOAR Quality Review Checklist for SSI/SSDI or establish your own quality review procedures (e.g. mentoring, supervisory reviews, reviewing Medical Summary Reports). Review the *Best Practices for Assisting SSI/SSDI Applicants Experiencing Homelessness* to assess fidelity to the SOAR model. Hold regular steering committee meetings to identify and resolve any challenges.
7. **Track and report outcomes.** Use the SOAR Online Application Tracking (OAT) program to collect and report outcomes. It's free, web-based (<https://soartrack.prainc.com/>), and easy to use.
8. **Fund and sustain.** Use your outcomes to expand or sustain your SOAR project. Analyze data and report the cost savings associated with SOAR. Share success stories; give presentations to influential leaders and potential funders. High reimbursement and recoupment totals can be used to attract additional resources and supplemental funding.