## Overview

The SOAR (SSI/SSDI Outreach, Access and Recovery) Online Course trains case managers to assist individuals who are experiencing homelessness to apply for the Social Security Administration (SSA) disability programs: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). The techniques taught in this online course can improve the quality and completeness of any application for SSI/SSDI, however, the label "SOAR" should only be used on SSI/SSDI applications for persons who are homeless or at risk for homelessness.

The SOAR Online Course consists of seven classes, each of which has a series of articles, short quizzes, and a practice case. This practice case provides an opportunity for case managers to apply what they have learned by completing an SSI/SSDI application packet for a fictitious applicant using SOAR techniques. Video interviews, medical records, and progress notes provide the information needed to complete SSA forms and write a Medical Summary Report (MSR) for the applicant. The complete application packet is submitted to the SOAR Technical Assistance (TA) Center for review. Upon approval, the participant will receive a certificate of completion and 16 Continuing Education Units (CEUs) from the National Association of Social Workers (NASW). There is no charge for this course.

We estimate that it will take about 16 hours to complete the course and participants can work at their own pace, starting and stopping as they wish. However, we encourage students to complete the course within 30 days to retain the information learned and get connected sooner to local SOAR initiatives.

## Learning Objectives

### Class 1: The Need for SOAR
*The Need for SOAR* provides an introduction to SOAR, its values, and the roles and responsibilities of key stakeholders, especially case managers.
- Why SOAR is an important tool for case managers to use when assisting people who are experiencing or at-risk of homelessness and who have a mental illness, co-occurring substance use disorder or other disability apply for SSA disability benefits
- What values inform the SOAR process
- Important community organizations and stakeholders necessary for a successful SOAR effort and the roles they play
- An overview of SSA's disability benefit programs, SSI and SSDI
- Key steps in the disability application process

### Class 2: Initiating the Application
*Initiating the Application* describes strategies to engage an applicant in the application process. It also stresses two key components in the SOAR program – becoming the applicant's representative and collecting medical evidence.
- Effective strategies for case managers to use in engaging the applicant they are assisting
- Importance of becoming the applicant's representative
- SOAR strategies for collecting medical evidence
- Ways of establishing the protective filing date and starting the application process

### Class 3: Exploring Basic Eligibility

The Social Security Administration has two types of eligibility requirements – medical and non-medical. *Exploring Basic Eligibility* examines the non-medical requirements, which include resources and living arrangements.

- What constitutes "non-medical" eligibility
- Income and resources limits for SSI eligibility
- How to complete the SSI and SSDI application forms
- Different types of living arrangements and their impact on potential benefits

### Class 4: Medical Information

*Medical Information* focuses on the medical eligibility requirements. It describes what information is necessary and the steps in the disability determination process.

- What medical documentation is necessary
- How to work with SSA's Listings of Impairments
- Steps in the disability determination process
- Strategies for gathering information about substance use
- What Consultative Exams are and when they are required
- How to complete the Adult Disability Report

### Class 5: The Link to Functioning

Medical records alone are frequently not adequate for the disability determination process. It is important to make the link between the diagnosis and the applicant's ability to function in a work setting. SOAR documents this link in the Medical Summary Report.

- Importance of linking the illness or condition to the applicant's ability to function in four main areas
- How to effectively write about functioning
- Elements of the Medical Summary Report

### Class 6: Completing the Application Packet

There are several documents that need to be included in a complete SOAR application packet that is submitted to SSA. There is also necessary follow-up post approval. *Completing the Application Packet* covers these topics, and also includes a discussion of appeals in the event of a denial.

- Elements of a complete SOAR application packet
- Next steps following an approval
- SSA's appeals process

### Class 7: Supporting Recovery

Getting disability benefits is an initial step on the road to recovery. *Supporting Recovery* reviews other programs that can assist an applicant after s/he receives disability benefits.

- Strategies for accessing housing once benefits have been received
- Medicare Savings Programs to help with health care costs
- Work incentives for applicants wishing to return to work