

Welcome to SOAR

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What is SOAR?

- ▶ SOAR: SSI/SSDI Outreach, Access and Recovery.
- ▶ SOAR is an expedited Social Security benefits program for adults who are experiencing homelessness or are at risk of becoming homeless.
- ▶ Funded by the Substance Abuse and Mental Health Services Administration (SAMHSA)





Overview of Learning Objectives



- Describe how the SOAR process addresses barriers typically encountered by individuals experiencing homelessness.
- Identify the role the SOAR Case Manager has in supporting clients to secure benefits through SSA
- Understand how to integrate a SOAR program into existing homeless or supportive services



Outcomes

- Substantial increase in access to SSI and SSDI entitlements
- 2011 study of SOAR outcomes showed 73% approved
- Average days from application to decision was 91 days
- SOAR critical components promote successful outcomes
- Submission of medical records maybe most critical
- Consultative exam predictive of poorer disability application

2019

National Outcomes

2019 Outcomes

INITIAL APPLICATIONS

63%
approval rate

4,273
initial approvals

108
days to decision
on average

APEALS

42%
approval rate

667
appeals approvals

187
days to decision
on average

Cumulative Outcomes

65% cumulative initial approval rate

43,486
cumulative initial approvals

6,591
cumulative appeal approvals

50,077
people receiving benefits because of SOAR

Financial Outcomes

\$3,714 | average back payment received by individuals (2,731 cases reporting)

\$6,482 | average Medicaid reimbursement per beneficiary (214 cases reporting)

\$463M | brought into the economies of the participating localities

Top States

81%
approval rate

TOP 10 STATES*

Pennsylvania
Tennessee
Maryland
Arkansas
North Carolina

Oklahoma
Virginia
South Carolina
Nevada
Louisiana

The SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance (TA) Center is funded by the Substance Abuse and Mental Health Services Administration (SAMHSA) and is a national program designed to increase access to the disability income benefit programs administered by the Social Security Administration (SSA) for eligible adults and children who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder.

Contact SOAR: soar@prainc.com | (518) 439-7415 x2 | <https://soarworks.prainc.com/>

*Inclusion: Highest cumulative approval rates on initial application for states with at least 300 cumulative decisions, at least 24 decisions in 2019 (2 per month), and a 2019 approval rate above the national average. Combined, these states had 15,757 decisions.



SSI

- SSI: Supplemental Security Income.
- SSI benefits for 2020 are \$943.72
- SSI is accompanied by MediCal.
- SSI may be available for persons over age 65 even if they are not disabled.

SSDI

- SSDI: Social Security Disability Insurance.
- SSDI benefit amounts are based on a persons earnings.
- SSDI is accompanied by Medicare after 2 years.

Eligible Adult

- ▶ Persons 18 years of age or older.
- ▶ Persons within one month of their 18th birthday.
- ▶ Persons within 180 days of their 18th birthday who are aging out of the foster care system.





Criteria for SOAR Eligibility

- ▶ Experiencing homelessness, risk of being homeless and non fixed residency.
- ▶ Have a condition and diagnosis that impacts the persons ability to work and expected to last 12 months or end in death.
- ▶ Conditions include:
 - ▶ Serious persistent mental illness and/or
 - ▶ Serious physical impairment and/or
 - ▶ Substance use disorder
- ▶ Marked restrictions:
 - ▶ Understand, remember or apply information.
 - ▶ Interact with others.
 - ▶ Concentrate, persist or maintain pace.
 - ▶ Adapt or manage oneself.


Homelessness and Disability

- ▶ In 2018 24% of adults experiencing homelessness were disabled and unable to work.



Veterans and SOAR





Barriers to accessing Social Security benefits and experiencing homelessness

- Lack of medical records or diagnosis
- No transportation
- Mental illness prevents client from seeking care
- Lack of stable mailing address
- Difficulty navigating system
- Difficulty reading and understanding program/benefit requirements
- Difficulty remember treating sources



History of SOAR Program

- ▶ SOAR has its roots in a Social Security Administration funded demonstration project that started in Baltimore in 1993 and still continues today.
- ▶ In September 2009, SAMHSA awarded a five-year contract for the SOAR Technical Assistance (TA) Center. Renewed in 2014.
- ▶ Policy Research Associates, Inc.
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The SOAR Vision

- ▶ A Collaborative process
- ▶ Facilitates communication among SSI/SSDI benefit applicants, case managers, SSA, Disability Determination Services (DDS), and community providers
- ▶ Case managers gather targeted, and relevant information for SSA and DDS
- ▶ Helps the determination process by providing assistance to SSA and DDS;
- ▶ Seeks approval on initial applications, avoiding appeals
- ▶ Works to increase access to supportive services and employment opportunities



Critical Components

- Serve as the applicant's representative
- Gathering and submitting medical evidence
- Write and submit a Medical Summary Report (MSR)
- Obtain a Co-Signature on MSR by acceptable medical source
- Complete a quality review prior to submission



Application process template

- Gather Information on prior/pending claims: obtain release of information
- Set the protective filing date (PFD)
- Maintain communication
- Submit the application packet to SSA
- SSA application processing
- DDS application processing
- Electronic Submission of Medical Records and MSR

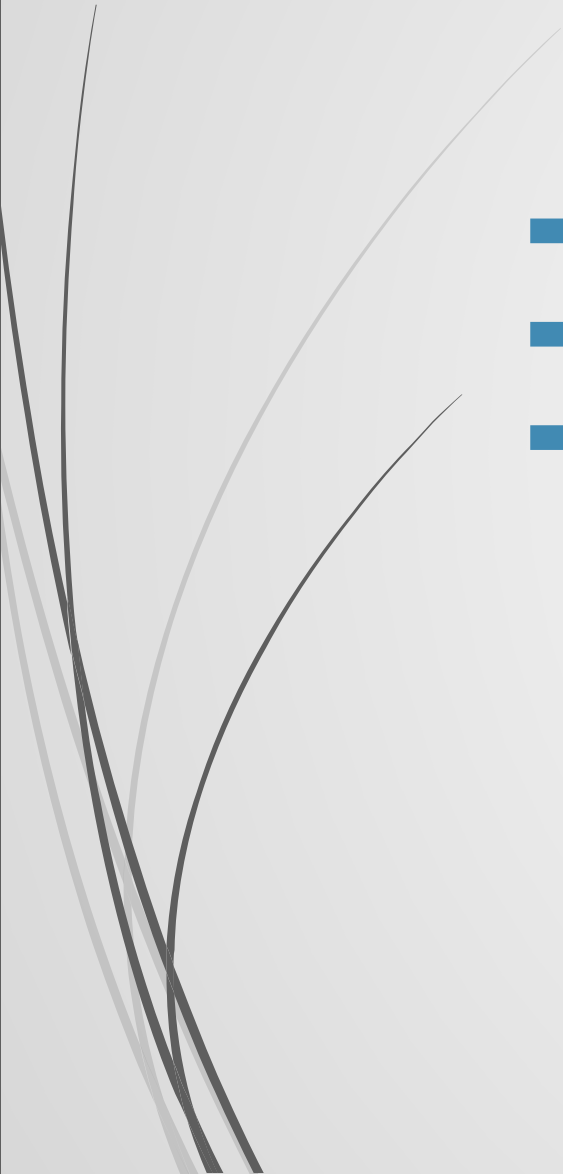


Application Process at ICS

- Online SSA 16 and SSA 3368.
- SSA 8000 on paper.
- SSA 3373 and SSA 3369.
- Submit Application to Social Security.
- Call SSA to flag as Homeless and SOAR claim.
- Call DDS to determine assigned Analyst.
- Receive barcode from DDS office.
- Submit Medical Records, including MSR.
- Continue to Follow up with DDS analyst.

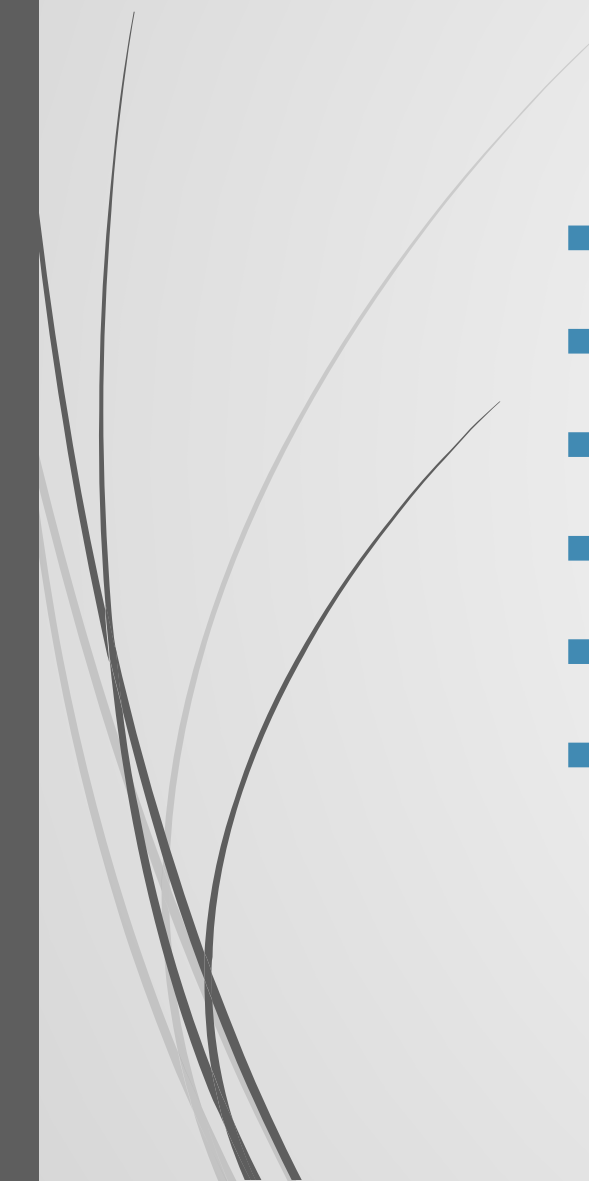


Building Relationships

- ▶ SSA local field office and DDS
 - ▶ Doctors
 - ▶ Community providers
- 



Role of the Case Manager

- ▶ SOAR is holistic
 - ▶ Hope and Recovery
 - ▶ Advocating for the Client
 - ▶ Knowledge of resources
 - ▶ Collaboration with providers
 - ▶ Embody SOAR Values
- 



Using Motivational interviewing

- ▶ To assist and encourage clients to:
 - ▶ Connect to care
 - ▶ Connect to supportive services
 - ▶ Connect to additional benefits
 - ▶ Connect to Housing



Implementation of SOAR

- ▶ Training for SOAR Case Managers.
- ▶ <https://soarworks.prainc.com/>
- ▶ Use of SAMSHA TA resources
- ▶ Create Agency policies and procedures

File Map Development



SSI/SSDI Outreach Access and Recovery (SOAR) File Map

Section 1	Section 2
<p>1. INTAKE</p> <ul style="list-style-type: none"> A. Interfaith Demographic Form B. Emergency Contact Form C. Identification: <input type="checkbox"/> DL or State ID <input type="checkbox"/> SS Card D. HMIS Multi- Party Agreement (MPA) E. HMIS Notice of Privacy Practices F. Interfaith Notice of Privacy Practices G. Interfaith Release of Liability H. Interfaith Confidentiality Agreement I. Interfaith Grievance & Appeals Procedure J. Release of Information (ICS or Community) K. Email/Text Consent Form <p>2. SOAR PAPERWORK</p> <ul style="list-style-type: none"> A. Referral B. Referral Confirmation C. SSA 3288 D. SSA 827 E. SSA 1696 F. SSA 8000 G. SSA 3368 (online) H. SSA 16 (signature on last page) I. Application For CA Meal Allowance J. HOPE/SOAR Cover Sheet K. Medical Summary Report (MSR) L. Function Report SSA 3373 M. Work History SSA 3369 N. Work History SSA 821 O. Application Tracking Worksheet 	<p>3. MEDICAL, CLINICAL & SAFETY</p> <ul style="list-style-type: none"> A. Homeless Verification Form B. Medication List C. Medical Records Tracking Form D. Medical Appointment Form E. Safety Plan (if applicable) F. Fax Confirmations G. Copies of bus passes, flex funds, etc H. Individualized Service Plan I. Budget J. SSA/DDS Correspondence <p>4. PROGRESS NOTES & DISCHARGE</p> <ul style="list-style-type: none"> A. Weekly Progress Notes B. Client Centered Team Meeting Minutes (when applicable) C. Incident Reports Write-Ups Notification Letters D. Discharge Summary E. OAT Summary



Implementation of SOAR

- Funding
- Dedicated SOAR program vs SOAR as part of existing program.
- Leverage of Agency resources
- Collaboration with FQHC
- OAT
- CES



Conclusion

As Case Managers, our goals are to work with the client to help them increase income and encourage them in continuing to strive for wellness.

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References

- ▶ Dennis, D., Lassiter, M., Connelly, W. H., & Lupfer, K. S. (2011). Helping adults who are homeless gain disability benefits: The SSI/SSDI Outreach, Access, and Recovery (SOAR) Program. *Psychiatric Services*, 62(11), 1373–1376. <https://doi.org/10.1176/appi.ps.62.11.1373>
- ▶ Lowder, E. M., Rade, C. B., Ware, D., & Desmarais, S. L. (2020). Barriers and facilitators to the use of the SSI/SSDI Outreach, Access, and Recovery (SOAR) model with justice-involved adults. *Psychiatric Rehabilitation Journal*. <https://doi.org/10.1037/prj0000403>
- ▶ SOARWORKS SSI/SSDI Outreach, Access, and Recovery <https://soarworks.prainc.com>



Helping People Help Themselves
Interfaithservices.org