SOARWorks New York
(SSI/SSDI Outreach, Access, and Recovery)

Substance Abuse and Mental Health Services Administration (SAMHSA) SOAR Technical Assistance Center

September 24, 2019
The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).
Purpose and Objectives

• Share the importance of Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) benefits
  – Including income, health insurance, education and employment supports, and housing stability

• Offer opportunities for community members to get involved with SOAR
  – Connecting to local SOAR efforts, the SOAR Online Course, and the SOAR Online Application Tracking (OAT) program
A model for assisting eligible individuals to apply for Social Security Administration (SSA) disability benefits

For individuals who are experiencing or at risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities

Sponsored by SAMHSA in collaboration with the Social Security Administration (SSA) since 2005

All 50 states and Washington, DC currently participate
The SOAR Model

How does SOAR work?
Supplemental Security Income (SSI)

- Eligibility based on need: low income and resources; living arrangement
- Monthly amount based on Federal Benefit Rate: $771/month (2019)*
- Date of eligibility based on Protective Filing Date/Application Date
- Health insurance: Medicaid

Social Security Disability Insurance (SSDI)

- Eligibility based on insured status (FICA payments)
- Monthly amount based on earnings history
- Date of eligibility based on “date of onset” of disability, 5 month waiting period
- Health insurance: Medicare

*https://www.ssa.gov/ssi/text-general-ussi.htm
SSA’s Definition of Disability

- **Medical Condition(s)**
  - Diagnosis
  - Documentation
  - Duration

- **Functional Impairment(s)**
  - Severity
  - Work
  - SGA
More Than Income

- Access to health care and housing
- Increased education and employment opportunities
- Decrease in incarcerations and hospitalizations
How do States and Communities Benefit?

SSI and Medicaid bring federal dollars into states, localities, and community programs:

• Health providers can recoup cost of uncompensated care.
• States and localities can recoup the cost of public assistance.
• Cash benefits and back payments received by individuals is spent in the local community (2018: $406 million*).

* https://soarworks.prainc.com/article/soar-outcomes-and-impact
What Makes SOAR Unique?

SOAR-trained case workers are the heroes!
SOAR Leadership Structure

**State Team Lead**
- Facilitates state steering committee
- Directs plans to grow & sustain statewide activities
- Serves as liaison to localities
- Maintains relationships with SSA & DDS
- Submits SOAR outcomes to the TA Center

**Local Lead**
- Facilitates local steering committee
- Directs local implementation plans
- Facilitates SOAR Online Course cohorts
- Conducts SOAR Online Course Review Sessions
- Ensures quality applications & reports outcomes

**Case Manager**
- Completes high-quality SSI & SSDI applications using the SOAR model
- Communicates with local SSA & DDS representatives
- Tracks application outcomes

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*OAT: Online Application Tracking Program  
*DDS: Disability Determination Services  
*TA: Technical Assistance
Oh, the support you will receive!

SOAR TA Center Activities and Support

- SOAR Online Course
- SOAR Leadership Academy
- SOAR Online Application Tracking (OAT) Program
- SOARWorks Library
- Individual Technical Assistance
- SOARing Over Lunch
- SOAR eNews
- Bi-Monthly Webinars
SOAR Works!

*CUMULATIVE OUTCOMES*

- **39,213** cumulative initial approvals
- **45,137** people receiving benefits because of SOAR
- **5,924** cumulative appeal approvals

*National SOAR outcomes as of June 30, 2018
https://soarworks.prainc.com/article/soar-outcomes-and-impact
2018 National Outcomes

*As compared to a 29% approval rate for all SSI/SSDI applicants nationwide

82% approval rate

Pennsylvania
Tennessee
Maryland
Arkansas

North Carolina
Washington
Oklahoma

District of Columbia
Virginia
New Mexico

*Inclusion: Cumulative approval rates on initial application, at least 300 cumulative decisions, at least 24 decisions in 2018 (2 per month), and a 2018 approval rate above the national average. Combined, these states had 14,089 decisions.
SOAR in New York

▪ SOAR currently has a 66% approval rate in an average of 90 days!
▪ State investment in SOAR, upcoming visits across the state
▪ Strong collaboration with SSA and DDS

Goals for SOAR in Rochester and the Surrounding Areas

▪ Grown and sustain the initiative
▪ Obtain dedicated funding for SOAR
▪ Ensure that the right people are being trained and they are able to complete SOAR applications post training
▪ Case managers track outcomes in OAT
▪ Create a streamlined process for SOAR (when applicable)
SOAR Online Course

Become Trained!
The SOAR Online Courses

SSI/SSDI Outreach, Access, and Recovery (SOAR) Online Course: Adult Curriculum

SSI/SSDI Outreach, Access, and Recovery (SOAR) Online Course: Child Curriculum
Benefits of the SOAR Online Courses

• Standardized training provided across all geographic areas
• SOAR Leaders can coordinate follow-up training and support
• Course is FREE, web-based, and self-guided
• 20 CEUs from National Association of Social Workers (NASW)
SOAR Online Course: Articles and Tools

The Need for SOAR

Key Lessons from SuperSOAR
The SOAR model for completing SSI applications utilizes five critical components that significantly increase the likelihood of an approval for those who are eligible.

1. The Need for SOAR

- Class Home
- What is SOAR?
- SSA: What is Disability?
- Access to the SSA Disability Program: Players, Roles, and Tasks
- Steps in the SSA Disability Application Process for Children
- Disability Determination: The SSA Sequential Evaluation
- The SOAR Model: Critical Components
- The SOAR Process: Critical Components in Action
- Definitions of Homelessness
- Identifying SOAR Applicants for Children’s SSI
- SOAR Values
- Try It: Key Concepts of Class 1
- Class 1 Conclusion
- Meet Your Client

2. Initiating the Application

3. Exploring Basic Eligibility

Part A: Address and Living Arrangement

Address (street address, city, state, zip code, country)

Part B: Current or Past Applications for SSI

Has the child previously applied for Supplemental Security Income (SSI)?

What was the decision on the application?

Part B: Current or Past Applications for SSI

Has the child previously applied for Supplemental Security Income (SSI)?

What was the decision on the application?

If pending, is the child working with a lawyer?

If denied, did the child appeal? Is he/she waiting on a decision? Is he/she working with a lawyer?

If approved, has the child received SSI?

Why is the child no longer receiving SSI?

April 23, 2018
Practice Cases: Videos and Records

Some City Youth Mental Health Center
Recovery is Possible!

PSYCHIATRIC EVALUATION

Program Participant: Marshall G. Williams
Participant ID: 1234567
Date of Birth: 02/19/2006
Gender: Male
Ethnicity: Caucasian

Diagnosis:
- 314.01 Attention-Deficit/Hyperactivity Disorder (ADHD)
- 300.02 Generalized Anxiety Disorder
- Z55.9 Academic or Educational Problem

History of Present Illness:
Marshall has a history of ADHD and anxiety and has been taking Adderall daily since

PROGRESS NOTE

Date: 10/01/2017
Resident: The Williams Family (Kimberly, Marshall and Jessica)
Case Worker: Sandy Jenkins
Location: Shelter Office

XYZ Community Shelter
Housing Is Healthcare!
Getting Involved: Time Commitment

• Training: 20 hours
• 20-40 hours per complete application
• SOAR Critical Components
• Outcome Tracking
• Benefit to Your Agency and the Individuals You Serve
SOAR Online Application Tracking

Have outcomes, get funding!
All the reasons OAT is awesome!

- Web based
- User friendly
- HIPAA compliant
- Monitors quality
- Takes only 3-5 minutes
- It’s FREE!

https://soartrack.prainc.com
OAT Case Worker Dashboard

Sarah Smith (Case Worker)
Agency One • Test City • YY

My Initial Outcomes
- Approvals: 70% (86 Approved)
- Denials: 30% (37 Denied)
- Decisions: 123 Total Initial
- Days: 30 AVG Days

Apps Created Email
202 05/14/2015 ssmith_cw@agencyone.com

New Applicants
Example: Jane Doe, born in 1985, with a SSN of 123-45-6789. ID = j85do6789

Create Applicant

Monthly Snapshot
New Apps this Month
Approved Apps this Month
INITIAL RECON ALJ NON SOAR
INITIAL RECON ALJ NON SOAR

Pending Apps
All Apps

Sarah Smith - Pending Applications
Application Type
Show All

Show 10 entries

ApiD PFD Date App Date Type
an58ef22222 - - ALJ Hearing using SOAR
dd12ww0345 12/14/2016 Reconsideration using SOAR

SAMHSA
Substance Abuse and Mental Health Services Administration
Where We’ve Been and Where We Want to Go
Looking back, moving forward!
Call to Action

- When your agency works with someone who is in need of SSI/SSDI, what services do you provide?
  - How is that going?
  - What are your outcomes?
  - What can be done better?

How can your agency/community become involved in SOAR?
Discussion

Question and Answer!
Additional Resources

• SOAR Works Website and Online Course: https://soarworks.prainc.com/

• SOAR Outcomes Tracking: https://soartrack.prainc.com/

• SSA Disability Information: https://www.ssa.gov/benefits/disability/

• SSA Employment Supports: https://choosework.ssa.gov/
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Thank You

SAMHSA’s mission is to reduce the impact of substance abuse and mental illness on America’s communities.

https://soarworks.prainc.com

soar@prainc.com

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) • 1-800-487-4889 (TDD)