

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

Substance Abuse and Mental Health Services Administration
(SAMHSA) SOAR Technical Assistance Center
Policy Research Associates, Inc.

September 24, 2019



SAMHSA
Substance Abuse and Mental Health
Services Administration

Disclaimer

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

What is SOAR?



- 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?

SSI and SSDI: The Basics

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

SSI/SSDI Eligibility: Definition of Disability for Adults

SSA's Definition of Disability



Medical
Condition(s)

- Diagnosis
- Documentation
- Duration



Functional
Impairment(s)

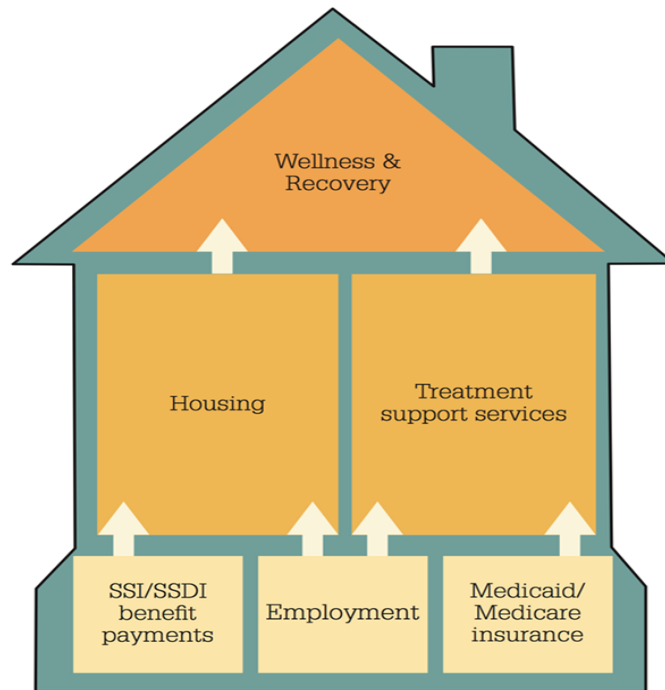
- Severity
- Work
- SGA

A Foundation for Recovery and Resiliency

More Than Income

- Access to health care and housing
- Increased education and employment opportunities
- Decrease in incarcerations and hospitalizations

SSI/SSDI: One Brick in Foundation



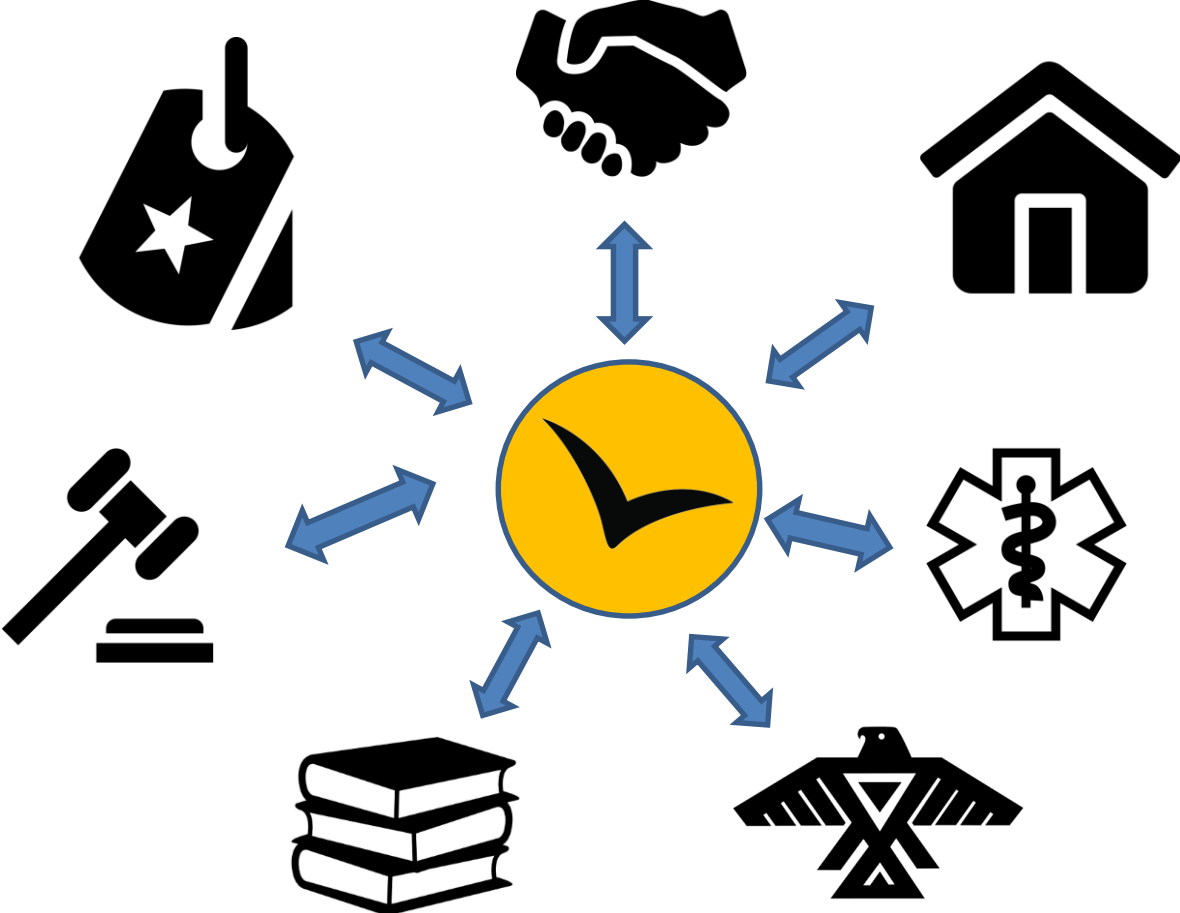
How do States and Communities Benefit?

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

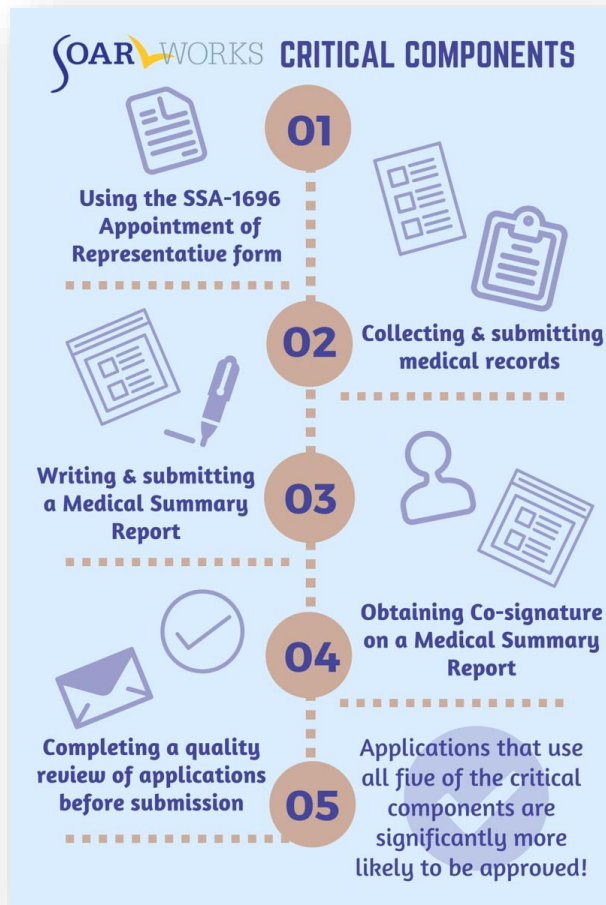
- Health providers can recoup cost of uncompensated care.
- States and localities can recoup the cost of public assistance.
- Cash benefits and back payments received by individuals is spent in the local community (*2018: \$406 million**).

* <https://soarworks.prainc.com/article/soar-outcomes-and-impact>

Community Collaboration



What Makes SOAR Unique?



SOAR-trained case workers are the heroes!



SOAR Leadership Structure



SOAR TA Center

- Facilitates strategic planning meetings
- Conducts Leadership Academies, webinars, & learning communities
- Develops resources, including SOARWorks, the SOAR Online Course, and OAT
- Provides TA at all stages of SOAR implementation



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

*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

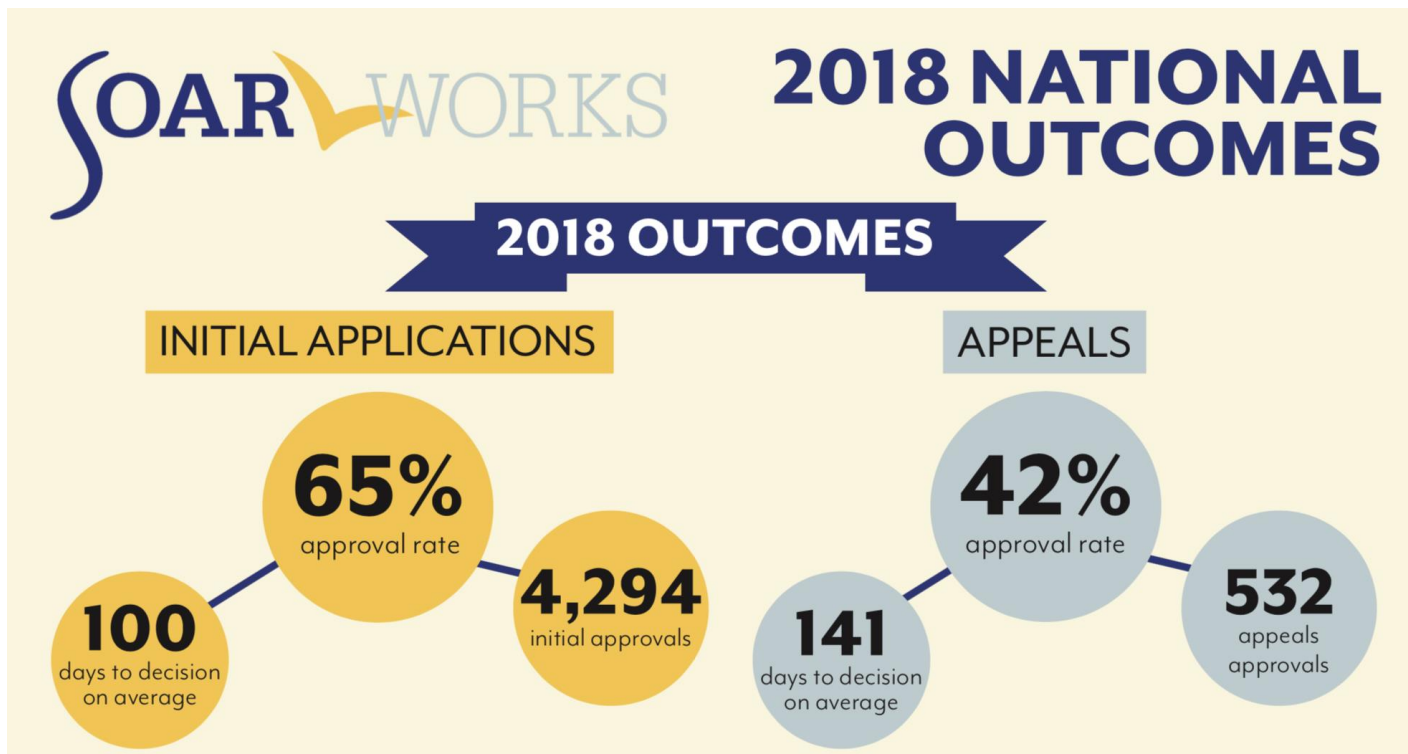
5,924

cumulative appeal
approvals

*National SOAR outcomes as of June 30, 2018

<https://soarworks.prainc.com/article/soar-outcomes-and-impact>

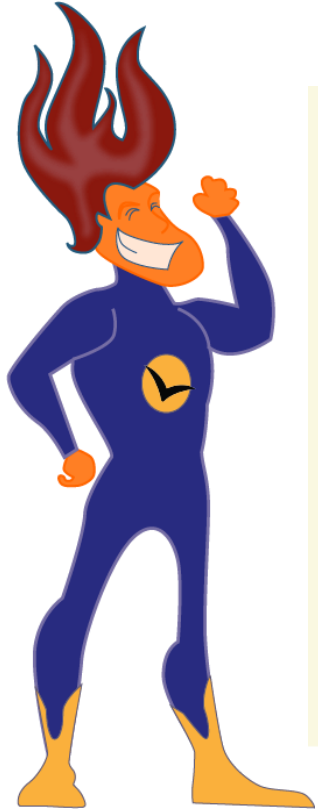
2018 National Outcomes



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

SSI Annual Statistical Report, 2017. Table 70. SSA Pub. No. 13-11827. Washington, D.C.: SSA, September 2018

SOAR Super Stars!



82%
approval rate

TOP 10 STATES*

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 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 Practice Case

Articles and Content

The screenshot shows the SOAR WORKS SAMHSA website interface. The top navigation bar includes 'Contact Us', 'Me', and 'Log Out'. Below the navigation bar is a search bar and a menu with options: 'SOAR In Your State', 'Online Course', 'Application Toolbox', 'Library', and 'Ask a Question'. The main content area is titled 'What is SOAR?' and features a 'View' button and a 'Printer-friendly version' link. The article text discusses homelessness and the Social Security Administration (SSA) programs. A sidebar on the right lists 'CLASSES IN THIS COURSE' with 13 items, including '1. The Need for SOAR' and '2. Initiating the Application'.

What is SOAR?

View Edit Manage display Webform Results Nodequeue

Printer-friendly version

Many people with disabilities who experience homelessness or are at risk of homelessness (e.g., those returning to the community from institutions such as jails, prisons, or hospitals) struggle to access the resources they need. The Social Security Administration (SSA) has two programs that can provide assistance.

Many suffer from disabling mental illnesses, co-occurring substance use, trauma, and medical issues that impact their ability to work. The path to recovery can be extraordinarily challenging when one is constantly struggling to meet basic needs. Having income and health care benefits is often a critical first step on the road to recovery.

The Social Security Administration (SSA) has two programs that can provide assistance.

- Supplemental Security Income (SSI), a needs-based program, for individuals who are blind, disabled, or elderly, with low income/resources
- Social Security Disability Insurance (SSDI) for blind or disabled individuals who are insured through employee and employer contributions to the Social Security Trust Fund
- In most states Medicaid and/or Medicare health insurance accompany these benefits for those eligible

Circumstances can impede access to income and health care benefits.

- SSA communicates mainly by mail, which is a challenge when one does not have a permanent, reliable address
- People who are experiencing homelessness often have sporadic medical care, making it difficult to access medical records to document disability
- Symptoms can interfere with cognitive functioning, making it difficult to navigate a complex system

CLASSES IN THIS COURSE

1. The Need for SOAR
 - Class Home
 - 1. What is SOAR?
 - 2. SOAR Values
 - 3. SSA: What is Disability?
 - 4. Overview of Social Security Disability Programs: SSI and SSDI
 - 5. Access to SSA Disability Programs: Players, Roles & Tasks
 - 6. Steps in the SSA Disability Application Process
 - 7. Disability Determination: The SSA Sequential Evaluation
 - 8. Definitions of Homelessness
 - 9. The SOAR Model: Key Components
 - 10. Identifying SOAR Applicants
 - 11. Steps to Completing an SSI/SSDI Application Using the SOAR Model
 - 12. Try It: Key Concepts of Class 1
 - 13. Conclusion
2. Initiating the Application
3. Exploring Basic Eligibility

Practice Case

The screenshot shows the SOAR WORKS SAMHSA website interface for the 'Practice Case: Meet Your Client' page. The top navigation bar is identical to the previous screenshot. The main content area is titled 'Practice Case: Meet Your Client' and includes a welcome message, instructions, and a video player. The instructions section lists three main tasks: playing the role of a caseworker, completing SSA forms and writing a Medical Summary Report (MSR), and submitting the Practice Case File at the end of Class 7. A video player is embedded, showing a woman's face. A sidebar on the right contains 'Practice Case Instructions' with detailed steps for uploading forms and documents.

Practice Case: Meet Your Client

Welcome to the SOAR Online Course Practice Case. This component of the course provides a unique opportunity to put into practice the SOAR techniques you are learning.

INSTRUCTIONS:

- You will **play the role** of a caseworker assisting a **fictitious** SSI/SSDI applicant.
 - On each Practice Case page (located at the end of every class) you will learn more about your applicant via interview videos, progress notes and medical records.
- With the information you gather, you will **complete five (5) SSA forms and write a Medical Summary Report (MSR)**.
 - NOTE: Use ONLY the SSA forms provided below as they are fillable versions created specifically for this course.**
- On later Practice Case pages, you will be prompted to complete the forms/write the MSR and add them to **Your Practice Case File**.
 - At the end of Class 7**, you will submit your complete **Practice Case File** to the SOAR TA Center for review.

Ready? Here we go...

Your name is "Will Jones" from XYZ Community Mental Health Center and you are assisting "Collette Rose" to apply for SSI/SSDI. Watch the interview video below to meet Collette and begin to gather information about her.

View Edit Manage display Webform Results Node export

SOAR Case Study - Female, Part 1

Practice Case Instructions

To add completed forms/documents to Your Practice Case File

- Click "Choose File" to find and select the file on your computer, and then click "Upload."
- Click "Save and Continue" to proceed to next class.
- You will submit your complete application packet to the SOAR TA Center **at the end of Class 7**.

* All blank SSA Forms are provided in Class 1 Practice Case: Meet Your Client

If you are having any difficulties, please contact us

SOAR Online Course: Articles and Tools

The Need for SOAR

View Edit Manage display Node export Articles



Key Lessons from SuperSOAR

SOAR is about people, not forms. Success comes from compassion, persistence, and confidence in using SOAR and the tools it offers. You do NOT need to become an expert in SSA regulations or have all the answers.

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.



Class Overview

The Need for SOAR provides an introduction to the SOAR model, 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 children who may be eligible for SSI
- Important community organizations and stakeholders necessary for a successful SOAR effort and the roles they play
- An overview of SSA's disability benefit program for children, SSI
- An introduction to the critical components of the SOAR model

CLASSES IN THIS COURSE

1. The Need for SOAR

Class Home

1. What is SOAR?
2. SSA: What is Disability?
3. Access to the SSA Disability Program: Players, Roles, and Tasks
4. Steps in the SSA Disability Application Process for Children
5. Disability Determination: The SSA Sequential Evaluation
6. The SOAR Model: Critical Components
7. The SOAR Process: Critical Components in Action
8. Definitions of Homelessness
9. Identifying SOAR Applicants for Children's SSI
10. Social Service Systems: Child Welfare, Children's Behavioral Health and Juvenile Justice
11. SOAR Values
12. Try It: Key Concepts of Class 1
13. Class 1 Conclusion

Meet Your Client

2. Initiating the Application

3. Exploring Basic Eligibility



Sample SOAR Referral Application: Child

Please complete in full and fax to: [Contact Person] at ____

Child's Name: _____ Date of referral: _____
Referring agency: _____ Referring staff and title: _____
Referral contact number: _____ Referral email address: _____

Child's Identifying Information:

Date of birth: _____ SSN: _____ Medicaid/Medical Insurance Number: _____
Gender: _____ Race: _____ Language(s) spoken: _____
Education (last grade completed): _____ Current school: _____
Parent/Legal Guardian contact name and number: _____

Part A: Address and Living Arrangement

Address (street address, city, state, zip code, county): _____

With whom is the child living? Check the appropriate selection

With parent(s)	<input type="checkbox"/>	With friends or other unrelated persons	<input type="checkbox"/>
With a relative who is not the child's parent	<input type="checkbox"/>	Unaccompanied (by him or herself)	<input type="checkbox"/>
With a guardian or foster parent	<input type="checkbox"/>		

Where is the child currently living? Check the appropriate selection

Homeless	At-Risk for Homelessness
Outdoors <input type="checkbox"/>	Doubled up/couch-surfing <input type="checkbox"/>
Shelter <input type="checkbox"/>	Received eviction notice or has substantial arrears in rent/utilities <input type="checkbox"/>
Transitional Housing <input type="checkbox"/>	Permanent supportive housing that is grant funded (Housing First placements) <input type="checkbox"/>
If homeless, how long has the child been homeless: Years _____ Months _____	Currently in or exiting foster care <input type="checkbox"/>
	Hospital/Residential Treatment/Group Home <input type="checkbox"/>
	Juvenile detention facility <input type="checkbox"/>

If the child is in a hospital, treatment, or juvenile detention facility, is he/she expected to be released within 30 days?

Yes No Was he/she experiencing homelessness before entering the facility? Yes No

Part B: Current or Past Applications for SSI

Has the child previously applied for Supplemental Security Income (SSI)?	<input type="checkbox"/> No <input type="checkbox"/> Yes	If yes, date: _____
What was the decision on the application?	<input type="checkbox"/> Pending	If pending, is the child working with a lawyer? <input type="checkbox"/>
	<input type="checkbox"/> Denied	Yes <input type="checkbox"/> No
	<input type="checkbox"/> Approved (previously received SSI)	If denied, did the child appeal? Is he/she waiting on a decision? Is he/she working with a lawyer?
		If the child previously received SSI, please list the dates: _____
		Why is the child no longer receiving SSI? _____

SSI/SSDI Outreach, Access and Recovery (SOAR) Technical Assistance Center

April 23, 2018

Practice Cases: Videos and Records

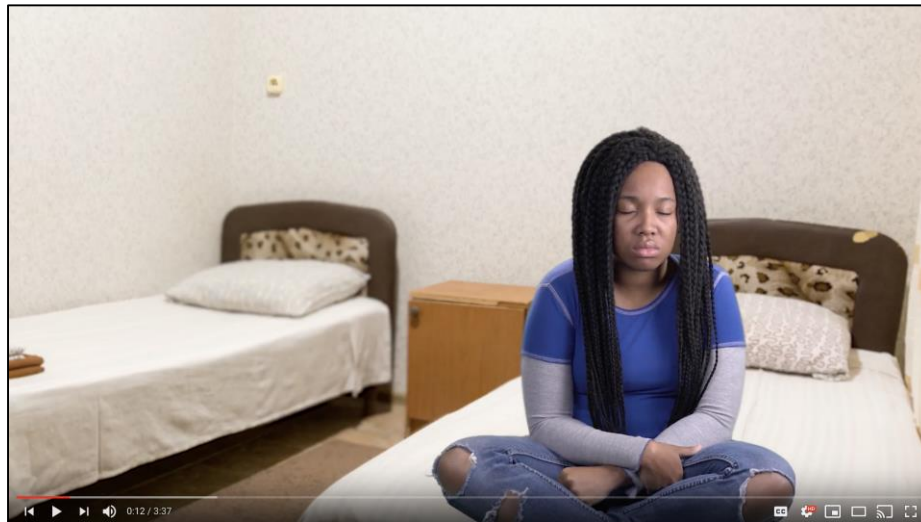


XYZ Community Shelter
Housing is Healthcare!

PROGRESS NOTE

Date: 10/01/2017
Resident: The Williams Family (Kimberly,
Marshall and Jessica)

Case Worker: Sandy Jenkins
Location: Shelter Office



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

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



Getting Involved with SOAR

You want to be a SOAR provider? That's great! Here's what to expect.

SOAR promotes recovery and wellness through increased access to Social Security disability benefits for eligible individuals who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR providers assist individuals with complete and quality applications. This is not an easy task, and we want to be sure that you understand the commitment required – we believe it is well worth the effort!

Training

The SOAR Online Course trains providers to assist individuals with the Social Security disability application process. The course includes an Adult Curriculum for assisting with Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) claims for adults and a Child Curriculum for assisting with SSI claims for children.

- The SOAR Online Course: Adult and Child Curriculums are free and are located on the SOARWorks website (<https://soarworks.prainc.com/content/soar-online-course-catalog>).
- Each curriculum consists of seven classes, each of which has a series of articles, short quizzes, and a practice case component. The practice case provides an opportunity for trainees to apply what they have learned in the course by completing a sample application packet for a fictitious applicant using SOAR techniques.
- It takes approximately 20 hours to complete each curriculum and participants can work at their own pace, starting and stopping as they wish. However, we encourage students to complete the curriculum within 30 days to retain the information learned.
- Upon successful completion, participants will receive 20 CEUs (continuing education units) from the National Association of Social Workers (NASW).

Many SOAR Local Leads offer one-day SOAR Online Course Review Sessions to review key components of the curriculum, discuss local/state practices, and connect new providers to local Social Security Administration (SSA) and DDS (Disability Determination Services) offices.

Time Commitment

We estimate that each SOAR application will take approximately 20-40 hours to complete, from initial engagement to receiving a decision on a claim. This generally occurs over the course of 60-90 days.

- The time spent on each application will vary depending on the amount of engagement that is needed as well as other variables such as the experience level of the SOAR worker. For example, engagement with an applicant who is residing in an institution may take 20 hours, while it may take longer to connect with someone who is living outside or difficult to contact.

SOAR Critical Components

SOAR providers with higher approval rates credit their success to implementing the SOAR critical components⁹ and submitting high quality applications. Use of these components significantly increases the

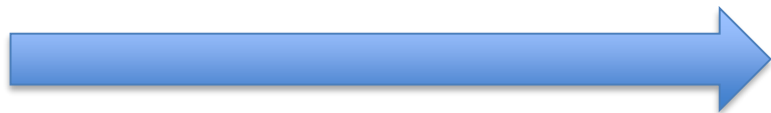
SOAR Online Application Tracking

Have outcomes, get funding!

Online Application Tracking (OAT)



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

OATWORKS
Online Application Tracking
Dashboard Applications Reports ▾
Hi, Sarah Smith (Case Worker) ▾ Logout

Sarah Smith (Case Worker) #12100

Agency One • Test City • YY

Apps Created Email

202 05/14/2015 ssmith_cw@agencyone.com

My Initial Outcomes

Approvals	Denials	Decisions	Days
70%	30%	123	30
86 Approved	37 Denied	Total Initial	AVG Days

YY

Approvals

85%

100 Total

National

Approvals

65%

53752 Total

New Applicants

Applicant ID ?

Example: Jane Doe, born in 1985, with a SSN of 123-45-6789. ID = ja85do6789

Create Applicant

Monthly Snapshot

0

New Apps this Month

INITIAL
RECON
ALJ
NON SOAR

0

Approved Apps this Month

INITIAL
RECON
ALJ
NON SOAR

Pending Apps

All Apps

Sarah Smith - Pending Applications

Application Type

Show All
▾

Export CSV

Show 10 entries Search:

ApID	PFD Date	App Date	Type	Status	Actions
an58fa2222	-	-	ALJ Hearing using SOAR	PENDING	Continue ▶
dd12ww0345	-	12/14/2016	Reconsideration using SOAR	PENDING	Continue ▶

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 you 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/>

Your State SOAR Team

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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>

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www.samhsa.gov

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