



An Introduction to SOAR

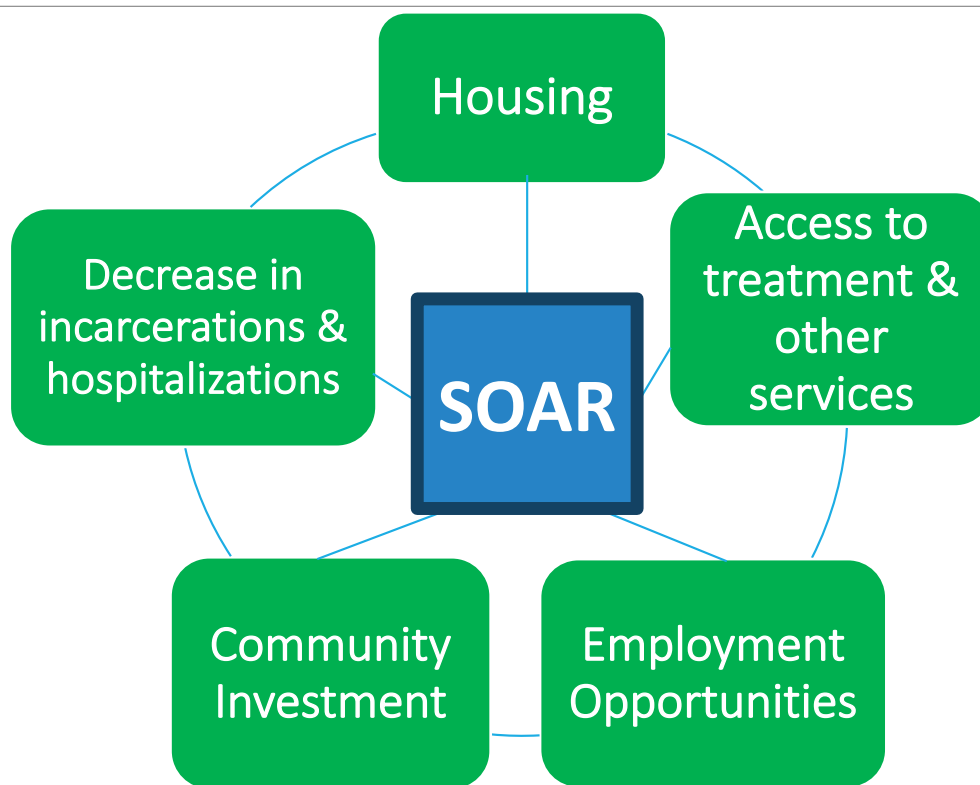
SSI/SSDI Outreach, Access and Recovery (SOAR)

Wanda Johns & Deanna Ballard

What is SOAR?

- A model for assisting eligible individuals to apply for Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI)
- 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 the Substance Abuse and Mental Health Services Administration (SAMHSA) in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, D.C. currently participate

SOAR Has Broader Goals



Definition of “Homelessness”

The label “SOAR” should only be used on SSI/SSDI applications for persons who are homeless or at risk for homelessness.

Homeless	At-Risk for Homelessness
<ul style="list-style-type: none">▪ Moving from place to place throughout the month▪ Living in uninhabitable housing, outside or in shelters▪ Living temporarily “doubled-up”▪ Living in hotels and motels paid for by Federal, State, or local government programs	<ul style="list-style-type: none">▪ Living in unstable or non-permanent housing▪ Exiting institution with no stable place to live▪ Permanent housing for those recently experiencing homelessness with limited income or relying on grant funding to sustain housing▪ Youth transitioning out of foster care

SSI & SSDI: The Basics

Supplemental Security Income (SSI)

Needs based; federal benefit rate is \$750 (2018); provides Medicaid in most states

Social Security Disability Insurance (SSDI)

Amount depends on earnings put into SSA system; Medicare generally provided after 2 years of eligibility

SSI/SSDI Eligibility

SSA's Definition of Disability



Medical Condition(s)



Functional Impairment(s)



- Diagnosis
- Documentation
- Duration

- Severity
- Work
- SGA

SOAR Partners



SSA

- Social Security Administration
- Federal agency that administers SSI/SSDI
- Makes the non-medical decision



DDS

- Disability Determination Services
- State agency under contract to SSA
- Makes the medical/disability determination



Medical

- Medical/Treatment providers
- Assessments/evaluations
- Medical records

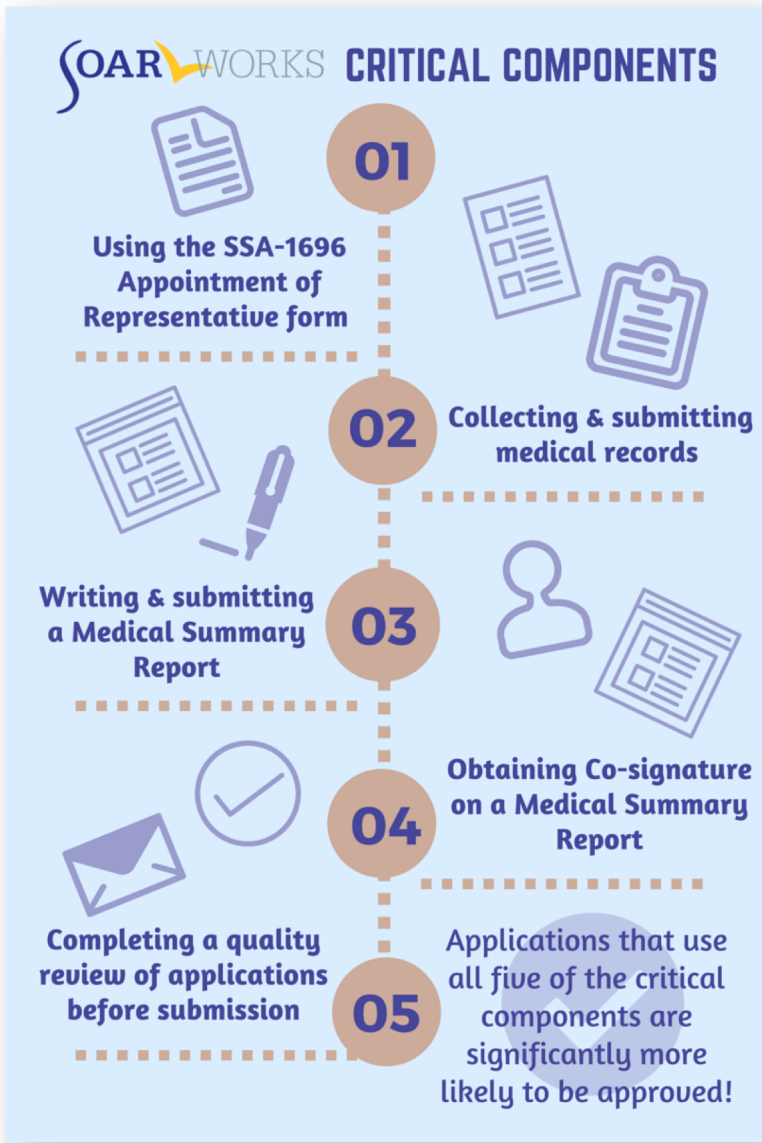


You

- **SOAR trained case managers** are actively involved every step of the process

What Makes SOAR Unique?

SOAR-trained case workers are the heroes!



SOAR and SSI Facilitation through CSD

- SOAR providers and SSI Facilitator collaborate to best serve individuals who are homeless or at risk of homelessness
- Disabled individuals receiving cash assistance (ABD and TANF) from the Community Services Division also receive SSI Facilitation Services
- SSI Facilitators assist individuals from the SSI/SSDI application through all appeal levels
- CSD has funds to pay for and assist in collecting medical evidence for SSI Facilitated individuals



PATH

SAMHSA's Projects for Assistance in Transition from Homelessness (PATH) funds services for people with serious mental illness (SMI) experiencing homelessness.

- 14 outreach teams statewide
- Trained in SOAR
- Connecting individuals experiencing homelessness to mainstream services and benefits
- Screening and diagnostic treatment
- Habilitation and rehabilitation
- Community mental health & substance use treatment
- Referrals for primary healthcare, job training, educational services, and housing
- Housing services

OAT

Online
Application
Tracking

- The SOAR Online Application Tracking (OAT) program is a secure web-based system that allows SOAR case managers to easily track their SOAR SSI/SSDI applications.
- Tracking outcomes is an essential piece of funding and sustainability efforts.

Web Based



User Friendly



HIPPA Compliant



Free





OAT DASHBOARD

0
pending

Wanda Johns (State Lead)

DSHS • Olympia • WA

#12967

Apps
0

Created
10/20/2016

Email
wanda.johns@dshs.wa.gov

My Initial Outcomes

Approvals
0 Approved

Denials
0 Denied

Decisions
Total Initial

Days
0 AVG Days



WA
Approvals
77%
363 Total

National
Approvals
65%
48079
Total

New Applicants

Applicant ID

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

Create Applicant

Monthly Snapshot

3

New Apps this Month

INITIAL - 3 TOTAL

RECON

ALJ

NON SOAR

0

Approved Apps this Month

INITIAL

RECON

ALJ

NON SOAR

Applications Summary (Cumulative)

196 TOTAL

Completed Initial SOAR

● App. (115) ● Den. (81)

Approval
Rate
59%

AVG Days
Decision
106

30 TOTAL

Completed Recon SOAR

● App. (11) ● Den. (19)

Approval
Rate
37%

AVG Days
Decision
208

3 TOTAL

Completed ALJ SOAR

● App. (1) ● Den. (2)

Approval
Rate
33%

AVG Days
Decision
160

9 TOTAL

Completed Non SOAR

● App. (8) ● Den. (1)

Approval
Rate
89%

AVG Days
Decision
19



OAT Reports



Summary Reports (Overall)

Dates: 01/01/2000 - 01/24/2018

States: WA

Counties/Parishes: All
Agencies: ALL
Users: ALL
Veterans: ALL
Age: ALL
Living Situation: ALL

	Initial	Reconsideration	ALJ Hearings
Approvals	115	11	1
Denials	81	19	2
Total Decisions	196	30	3
Approval Rate (%)	59%	37%	33%
AVG Days to Decision	107	209	160

APPROVED FOR

SSI Only	65 (57%)	5 (45%)	0 (0%)
SSDI Only	39 (34%)	3 (27%)	1 (100%)
Both	5 (4%)	3 (27%)	0 (0%)
Not Completed	6 (5%)	0 (0%)	0 (0%)

DEMOGRAPHICS

Male	131	21	1
Female	65	9	2
Military Service	44	7	0
AVG Age	44	40	54

OAT

Online Application Tracking



Role-Based Filters

Filters such as counties, agencies and users (caseworkers) are available based on the user's role and the data that is available to them.

Role	Can Access Data from...	Reports Most Helpful for...
Caseworker	<ul style="list-style-type: none">• Their own application entries	Tracking successes and considering areas where technical support is needed
Agency Lead	<ul style="list-style-type: none">• Assigned agency• All caseworkers assigned to that agency	Considering targeted technical assistance or reviewing outcomes at steering committee meetings
Local Lead	<ul style="list-style-type: none">• One or multiple counties/localities/regions• Agencies assigned to these localities• Caseworkers from those agencies	Reviewing Outcomes across agencies and counties and considering areas for additional follow-up support
State Lead	<ul style="list-style-type: none">• All caseworkers from all agencies in all localities across the state	Reviewing state plans, considering targeted technical assistance for agencies or localities and determining areas where additional SOAR support is needed

Overview of the SOAR Online Course

- The techniques taught in this online course can improve the quality and completeness of any application for SSI/SSDI
- Register at <http://soarworks.prainc.com>
- 20 hours to complete, 20 CEU's
- 7 classes (from SOAR 101 to work incentives!)
- Submit a practice case to the SOAR Technical Assistance (TA) center for review
- Cohort model – why it's important!



Leadership Academy Opportunities

What is a SOAR Leadership Academy?

The SOAR Leadership Academy is a three-day training program presented by the SAMHSA SOAR Technical Assistance (TA) Center designed to prepare individuals to serve as Local Leads within their communities, guide the SOAR initiative, and support individuals who complete the SOAR Online Course.



SOAR Leadership Academy

What is a SOAR Local Lead?

SOAR Local Leads assist with the implementation of their state's SOAR Action Plan and guide the SOAR initiatives in their communities by:

holding steering committee meetings;

leading SOAR Online Course training cohorts and conducting half-day SOAR Online Course Review Sessions;

mentoring individuals who complete the SOAR Online Course; and
reporting outcomes.



SOAR Leadership Academy

Expectations of Leadership Academy Registrants

Receive recommendation from the State Team Lead

Successfully complete the SOAR Online Course
(<http://soarworks.prainc.com>) prior to attending

Attend all three days of the program from 8:30 AM –
4:30 PM



Questions & Answers

HOW CAN WE HELP?