



Washington Low-Income Housing Alliance 2017 Conference On Ending Homelessness *SOAR SSI/SSDI Outreach, Access and Recovery*

Sponsored By:
Substance Abuse And Mental Health Services Administration
U.S. Department Of Health And Human Services

Revised: April 2017

SOAR

- SOAR stands for SSI/SSDI Outreach, Access and Recovery
- For people who are experiencing or at-risk of homelessness
- A model for assisting individuals to apply for Social Security disability benefits
- Sponsored by the Substance Abuse and Mental Health Services Administration (SAMHSA) in collaboration with SSA since 2005
- All 50 states currently participate

SSI & SSDI: The Basics

Supplemental Security Income (SSI)

Needs based; federal benefit rate is \$735 per month, \$779 in WA (2017); 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

Who can be helped by SOAR?

SOAR assists adults who are experiencing *or* at risk for homelessness *and* who have mental illness, co-occurring disorder or other physical disabilities.

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 jails/prisons 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

Changing Lives Since 2005

- **31,356** persons experiencing or at risk for homelessness have been approved on initial application
- **67%** approval rate overall, in an average of **101** days in 2016
- Compares to 10-15 percent for unassisted applications from people who are homeless and 28 percent for all applicants
- Appeals can take a year or more; many people give up and do not appeal
- Estimate that in 2016 alone, SSI/SSDI for the individuals served by SOAR brought over **\$317 million** into the economies of participating states and localities

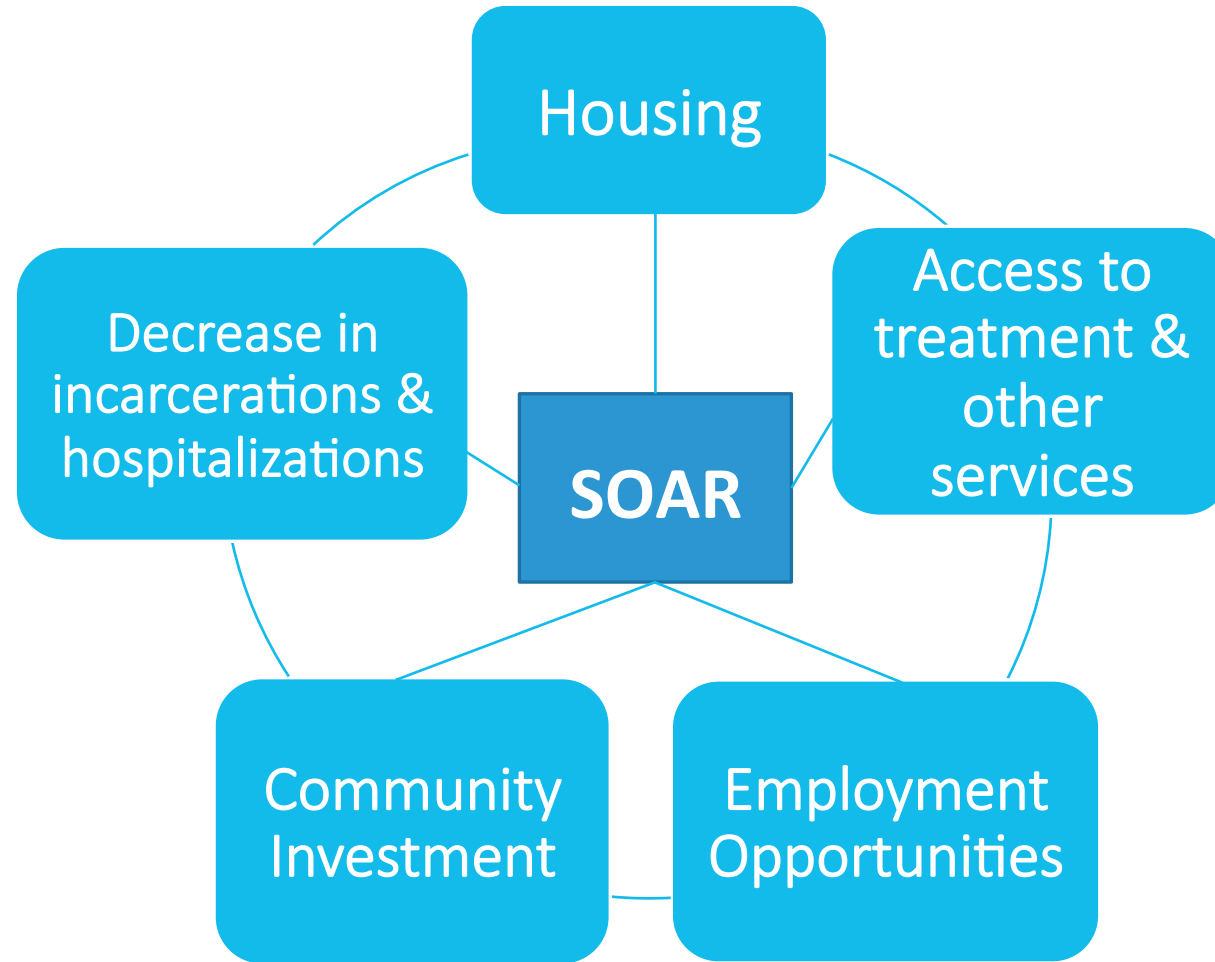
TOP 10 STATES



Pennsylvania
Tennessee
Maryland
Arkansas
North Carolina
South Dakota
Washington
Rhode Island
Alabama
Kansas



SOAR Has Broader Goals



The SOAR Way

- Case managers actively assist applicants and develop evidence
- Focuses on the initial application – “Get it right the first time!”
- Avoids appeals whenever possible
- Focuses on documenting the disability
- Successful SOAR states and communities:
 - Form steering groups (including SSA and DDS) that meet regularly to address challenges
 - Provide ongoing support to case managers assisting with applications so that communication and quality are enhanced (e.g., refresher trainings, quality review, support group meetings by phone or in person)

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 Fundamentals trainings
- 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

- Ambassadors for the SOAR initiative
- United in ending homelessness for individuals with disabling conditions

The SOAR Process

- SOAR process template developed in 2007- establishes workflow between SOAR caseworker, SSA and DDS
 - Washington State has one in place which is adapted to meet local SSA preferences
- Accepted and in place in all SSA regions; can be refined in collaboration with your local field office
- Includes:
 - Faxed consent form (SSA-3288) to establish and provide documentation of protective filing date
 - Claim held at SSA for up to 60 days after protective filing date
 - Case managers collect medical information without replication by DDS
 - Assigned contact staff at local SSA and DDS offices

Who Should Be Involved?

SSA/DDS

Advocates/
Champions

Corrections

Veterans
Affairs

Mental
Health
Services

Social
Service
Providers

Homeless
Services

Department
of Social
Services

Housing
Agencies

Vocational
Services

Legal
Services

Outreach
Workers/
PATH

Peers

Hospitals/
Health Care
Clinics

Youth
Services

Successful Model: Washington PATH

- Washington State PATH program:
 - Sponsored SOAR for over 14 years!
 - All of the Washington PATH programs have SOAR-trained staff.
 - PATH State Contact facilitates a monthly state SOAR Workgroup meeting (in-person and by phone)
 - Covers policy issues that affect SSI/SSDI application processes, implementing SOAR initiatives in communities, expanding SOAR training and collaborations between SSA, DDS, DSHS CSOs, CoC's, SSVF, VA, DOC and tracking outcomes
 - State PATH lead playing an integral role in expanding SOAR to every county in the state by:
 - creating local SOAR steering committees and strategic plans,
 - developing dedicated SOAR specialist positions, and
 - SOAR Local Leads

SOAR TA Center Activities and Support



SOAR Online Course



SOAR Leadership Academy



SOAR Online Application Tracking (OAT) Program



SOARWorks Library



SOAR Voices Blog



SOARing Over Lunch



SOAR eNews



Bi-Monthly Webinars

SOAR Online Course & Local Implementation

NEW OPPORTUNITIES

SOAR Online Course

<http://soarworks.prainc.com>



The screenshot shows the SOAR WORKS website, which is part of the SAMHSA (Substance Abuse and Mental Health Services Administration) network. The header includes the SOAR WORKS logo, the SAMHSA logo, and navigation links for Login, Sign Up, and Contact Us. Below the header is a navigation bar with icons and text for SOAR in Your State, Online Course, SOAR Voices Blog, Application Toolbox, Library, and Ask a Question. The main content area features a large banner image of a person walking on rocks in a stream, with the text "SSI/SSDI Outreach, Access and Recovery (SOAR) Online Training" and a button to "Enroll in this course". Below the banner, there are two columns of text. The left column is titled "About the SOAR Online Training" and describes the course's purpose and content. The right column is titled "Online Course Reflections" and contains three quotes from participants and trainers.

SOAR WORKS SAMHSA
SSI/SSDI Outreach, Access, and Recovery

Login Sign Up Contact Us

SOAR in Your State Online Course SOAR Voices Blog Application Toolbox Library Ask a Question

SSI/SSDI Outreach, Access and Recovery (SOAR) Online Training

[Enroll in this course](#)

About the SOAR Online Training

The SOAR Online Course trains case managers to assist individuals who are experiencing or at risk of homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for the Social Security Administration's (SSA) disability programs: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). The techniques taught in this course can improve the quality and completeness of any application for SSI/SSDI. Individuals who complete the course are encouraged to use what they learn to improve SSI/SSDI applications for themselves or others.

However, those who enroll in this course agree that the label "SOAR" will only be used on SSI/SSDI applications for persons who are homeless or at risk of homelessness.

Online Course Reflections

"Great job on this. It is exceptionally functional and will be well received."
- John Sperbeck, Alaska SOAR State Team Lead

"This training is excellent. It exceeded my expectations."
- Cindy Schwartz, Eleventh Judicial Criminal Mental Health Project, Miami, FL


"The idea of collaboration between SSA and DDS was really stressed, which I think is extremely important to this process..."
- Marion Malcome, SOAR Trainer, Chicago, IL

"I think the program will be a great venture for our trainees."
- Lori Norval, SOAR Trainer, Nevada, MO




SOARWorks Library,
full of great resources!




Contact Us |  Me | Log Out

SSI/SSDI Outreach, Access, and Recovery



SEARCH

 SOAR in Your State

 Online Course

 SOAR Voices Blog

 Application Toolbox

 Library

 Ask a Question

Library Home

View

Edit

Manage display

Webform

Results

Node export

 [Printer-friendly version](#)

Welcome to the SOAR Resource Library. Click on the links below to see articles, webinars, and other materials about various topics.

About SOAR

- [What is SOAR?](#)
- [National Outcomes](#)
- [SOAR Expansion Nationwide](#)

SOAR TA Center Products & Services

- [e-Newsletters](#)
- [Infographics](#)
- [Issue Briefs](#)
- [Webinars](#)
- [SOAR Online Course](#)
- [SOAR Voices Blog](#)
- [Online Application Tracking \(OAT\) Program](#)

Your SOAR Program

- [Community Collaborations](#)
- [Funding & Sustainability](#)
- [Outcomes](#)
- [Peer Supports](#)
- [Representative Payees](#)
- [SOAR Process Template](#)
- [Sample SOAR Job Description](#)

SSI/SSDI Applications

- [Application Toolbox](#)
 - [SSA Forms and Information](#)
 - [SOAR Tools and Worksheets](#)
 - [Sample SSI/SSDI Application packet](#)
 - [Sample Medical Summary Reports](#)
- [Appeals](#)
- [Engagement](#)
- [Medical Records & HIPAA](#)
- [Medical Summary Report \(MSR\)](#)
- [Substance Use](#)

Supporting Recovery

- [Employment & Work Incentives](#)
- [Health Care \(Medicaid/Medicare\)](#)
- [Housing](#)

Special Populations

- [Justice-Involved Persons](#)
- [Immigrants/Non-U.S. Citizens](#)
- [Tribal Communities](#)
- [Veterans](#)
- [Youth](#)



Substance Abuse and Mental Health Services Administration
1 Choke Cherry Road • Rockville, MD 20857
www.samhsa.gov • 1-877-SAMHSA-7 (1-877-726-4727)

SOAR Online Course

- Offers standardized training
- Expands SOAR to new geographic areas and audiences
- Allows SOAR State and Local Leads to:
 - Coordinate follow-up training on state-specific processes
 - Provide support to persons assisting with applications
 - Ensure high quality and complete applications
 - Track and monitor outcomes

SOAR Online Course Evaluation

An evaluation of the SOAR Online Course was published in *Frontiers in Public Health*:

- Successful course completions were most concentrated in areas that had *SOAR Local Leads*.
- Trainees who completed the SOAR online course *had higher data entry rates* for outcomes in SOAR OAT.
- Trainees reported a *high satisfaction rate* with the course and the comprehensive feedback provided by the SOAR TA Center.

<http://journal.frontiersin.org/article/10.3389/fpubh.2016.00104/full>

Tracking Outcomes


SOAR Fundamentals

Online Application Tracking (OAT)

<https://soartrack.prainc.com>








- A web-based program that allows case managers to keep track of their outcomes
 - Free
 - Easy to use
 - Accessible from any web browser
 - Nothing to download
- On a secure server
- HIPAA compliant
 - No personal identifying information is collected

Registration

The logo for OAT WORKS Online Application Tracking, with "OAT" in blue, a yellow swoosh, "WORKS" in light blue, and "Online Application Tracking" in a smaller blue font below.

Register for OAT

New State, Agency & Local Lead OAT users will be approved by SAMHSA SOAR TA Center staff. New Case Workers with agencies in the current system will have immediate access to login. New State, Agency & Local Lead OAT users will receive an email confirming registration when you have been approved. If you have any questions about the registration process or this program, please contact us at soaroat@prainc.com or 518-439-7415 ext. 5242.

FIRST NAME	LAST NAME	
PASSWORD 	VERIFY PASSWORD	
EMAIL	PHONE	EXT
STATE Select State 		
ROLE Select Role 		
COUNTY/PARISH Select County/Parish 	CITY Choose cities... 	
AGENCY Select Agency 		
FUNDING SOURCE My position is funded by 		

SOAR training I have attended:

Please fill out any of the below that you have participated in.

Outcomes in OAT

- Outcomes for initial applications & appeals
 - Approval rates
 - Time to decision
 - Critical components
- Optional outcomes
 - Housing
 - Employment
 - Medicaid and other public benefit reimbursements

Applicant Identification (ID)

- No personally identifiable information
- Alpha-numeric ID
 - First 2 letters of first name
 - Last 2 digits of the birth year
 - First 2 letters of last name
 - Last 4 digits of the Social Security Number
- Case workers should record Applicant ID in the case file for cross reference

Case Worker Dashboard

[Dashboard](#) [Applications](#) [Reports](#) [▼](#)

Hi, Sarah Smith (Case Worker) [▼](#) [Logout](#)

Sarah Smith (Case Worker)

#12100

Agency One • Cheyenne • WY

Apps

Created

Email

41

05/14/2015

ssmith_cw@agencyone.com

My Initial Outcomes

Approvals	Denials	Decisions	Days
93%	7%	27	46
25 Approved	2 Denied	Total Initial	AVG Days

WY

Approvals

66%

173 Total

National

Approvals

65%

41871 Total

New Applicants

Applicant ID

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

Create Applicant

Pending Apps

All Apps

Monthly Snapshot

5

New Apps this Month

INITIAL - 2 TOTAL

RECON

ALJ

NON SOAR

2

Approved Apps this Month

INITIAL - 2 TOTAL

RECON

ALJ

NON SOAR

Example: Summary Report

OVERVIEW

Initial SOAR

Approved
Denied

Reconsideration

Approved
Denied

ALJ Hearings

Approved
Denied

Approvals	271	9	8
Denials	157	3	3
Total Decisions	428	12	11
Approval Rate (%)	63%	75%	73%
Avg Days to Decision	104	160	169

APPROVED FOR

SSI Only	154 (57%)	5 (56%)	6 (75%)
SSDI Only	60 (22%)	2 (22%)	1 (13%)
Both	36 (13%)	1 (11%)	0 (0%)
Not Completed Decision entered, benefit detail not provided*	21 (8%)	1 (11%)	1 (13%)

*Please add post decision details including benefit awarded.

DEMOGRAPHICS (OF ALL DECISIONS)

Male	241	8	5
Female	187	4	6
Military Service	34	1	0

Tools To Help

- SAMHSA SOAR TA Center Tools
 - Quality Review Checklist
 - Identifying SOAR Applicants
 - Steps to Completing and SSI/SSDI Application using the SOAR Model
- Your state's SOAR Process – outlines exactly how quality applications should be completed

You CAN Do This!

- Quality applications mean fewer denials, faster processing times and better relationships with SSA and DDS
- Fast approvals help to quickly improve the lives of the people we serve
- This is why we do this work!

The Approval Is Only The Beginning

Encouraging Employment
Accessing Housing & Other Services

Using SOAR as a Mythbuster

Myths	Facts!
If you work, your SSI/SSDI application will be automatically denied	Nope! Applicants can work and earn up to \$1,170/month (2017) and still be eligible
Benefits and health insurance end immediately when you start working	No way! SSA has amazing work incentives to help applicants keep cash and health benefits
You can only work part-time while receiving disability	No siree! There is no limit to the amount of hours you can work and receive disability
If Social Security knows you are working, they will say you aren't disabled anymore	Nay! SSA suspends Continuing Disability Reviews while beneficiaries use Ticket to Work and make progress towards employment goals

Employment Strategies

1. Educate individuals that they can work and receive SSA disability benefits - be a myth buster!
2. Utilize Social Security work incentives and SSA's Ticket to Work program
3. Celebrate successful examples of individuals who work while receiving SSA disability benefits

Through these strategies we can increase income and housing stability and end homelessness!

Start Talking about Work

- Begin the conversations early and have them often
- Remind the individual that it is their decision, let him/her weigh pros and cons
- Provide reassuring and encouraging messages
- Ensure the applicant is equipped with accurate information about working while applying for and receiving SSI/SSDI

Benefits planning is essential!

Incorporate SOAR and Employment into Your Services

- ✓ Gather more information:
 - Tip Sheet: *SSI/SSDI and Employment: A Brief Overview of SSA Work Incentives*
 - New! Myth Busting Resource: *Yes You Can Work!*
 - Reach out to the SOAR TA Center with questions and for support
- ✓ Explore options for SOAR training with your staff
 - Free online SOAR training, available at: <http://soarworks.prainc.com>
 - Use Class 1 of the SOAR Online Course as a “SOAR 101”
 - New! *Employment Conversation Guide with Sample Responses*
- ✓ Collaborate with community partners to refer individuals to local SOAR initiatives

CABHI: SOAR and IPS Pilot

- SOAR: SSI/SSDI Outreach, Access and Recovery
- IPS: Individual Placement and Support
- 12 State Teams who received the CABHI-States-Enhancement Grant were invited to participate
 - AZ, CO, CT, IL, MA, MI, MS, NV, OH, TN, UT, WI
- Learning Community: Four 90 minute, weekly calls to kick off the pilot (Started May 6)
- Pilot: Monthly check-in calls with pilot participants to report on progress (Started June 30)

CABHI: SOAR and IPS Pilot

Objectives

1. Demonstrate how SOAR and IPS can form a cohesive and coordinated set of services for income support
2. Evaluate lessons learned from integration of services
3. Identify how to apply pilot findings to wider SOAR/employment services community

Employment Conversation Guide and SAMPLE Responses



Employment Conversation Guide

Purpose of the Guide

- To begin conversations about work with SSI/SSDI beneficiaries and those applying for benefits.
- To ensure that the individual is receiving accurate information about employment and returning to work.
- To engage with an individual and determine their work goals.

EMPLOYMENT CONVERSATION GUIDE	
Name:	
Let's talk about work. (Add facts/positive statements about work)	
Questions to Ask	Responses
Why do you want to work? ▪ What triggered your interest in work?	
What kind of work do you want to do? ▪ How did you decide on that type of job?	
What do you feel are benefits to working?	
How long have you been out of work?	
How has not working affected you emotionally, financially, socially?	
When you first began to think about work, did you talk to anyone about that? ▪ What did they say?	
What have other people told you about work?	
How do friends/family feel about you returning to work?	
Have others encouraged or discouraged you from working?	

Purpose of the Guide

- To begin conversations about work with SSI/SSDI beneficiaries and those applying for benefits.
- To ensure that the individual is receiving accurate information about employment and returning to work.
- To engage with an individual and determine their work goals.

EMPLOYMENT CONVERSATION GUIDE		
Name:		
Let's talk about work. (Add facts/positive statements about work)		
Questions to Ask	Responses	Case Manager Responses
How long have you been out of work?	I'm only 18 but have never worked, ever.	That is often the case when we are working with younger people like you. It is positive that you are considering work now. You can add in extra money to supplement your benefits and consider other good things that come from working like making new friends. http://www.mentalhealthamerica.net/meaningful-work-and-recovery
	I get day jobs now and then, under the table work.	That is great! Are there types of day work you like more than others? Painting? Construction? Would you like to do more of that type of work, if it was steady?

Yes You Can Work! Myths & Facts



YES, YOU CAN WORK!

Interested in returning to work or trying out work for the first time, but unsure how work will impact your Social Security benefits or if work is even possible for you?

Many people receiving disability benefits, or applying for benefits, really want to work, but fear the consequences. This handout will give you the information you and your family need to learn more about programs, which will assist you with returning to work, or trying out work for the first time!

We can help you find success! These recommended resources provide information on where you can go for assistance to learn more about employment for people with disabilities. Quality services are available to help you better understand all of the federal work incentive programs, including Social Security work supports, for people with disabilities.

MYTHS WE'VE HEARD ON THE STREETS AND FACTS TO BUST THEM UP!

MYTH

"People with mental illness shouldn't work."

FACT

People with mental health conditions are just as productive as other employees. Employers who hire people with mental health conditions report good attendance and punctuality as well as motivation, good work, and job tenure on par with or greater than other employees.

MYTH

"I will lose my disability benefits, income and health insurance, which I have worked so hard to obtain!"

FACT

Not so fast! SSA offers comprehensive work incentives which allows you to keep your benefits for quite a long time. Should you be unable to continue working as a result of your disability, SSA may restart your benefits. Because some SSA rules may be hard to understand, all states have benefit planning resources to help you get started. <https://www.ssa.gov/redbook/>

MYTH

"I have never worked before, so I have no skills an employer needs."

FACT

People with disabilities with little or no work history do find work that meets their strengths, preferences, abilities, and skills. Supported employment services focus on these factors to help you seek and find competitive employment in the community.

MYTH

"My family does not want me to work because they fear my symptoms will get worse."

FACT

Recent studies found that employment actually improves symptoms! Work offers less social isolation and a sense of purpose, just to name two benefits! Work is more than just a paycheck, and this brochure offers helpful resources for your family and friends to be supportive and understanding of your career goals.

MORE INFORMATION & RESOURCES

Social Security Administration (SSA)

SSA has a free Ticket to Work Program available to all SSI/SSDI beneficiaries. Specialists connect individuals to employment supports in their area, such as career counseling, training, and job placement. Also, they can explain in detail how going back to work will impact a person's benefits. The website includes links to local employment resources and offers free training webinars for beneficiaries and service providers. <https://www.choosework.net/>

Supported Employment

The Association of Persons in Supported Employment (ASPE) helps improve and expand integrated employment opportunities, services, and outcomes for persons with disabilities and has numerous resources for individuals, employers, and community organizations. <http://apse.org/>

VCU National Training and Data Center

The Virginia Commonwealth University National Training and Data Center provides comprehensive training and technical assistance to Work Incentives Planning and Assistance (WIPA) projects, the Ticket to Work Help Line, and community partners to ensure accurate and timely support for beneficiaries on the road to employment and financial independence. <http://vcu-ntdc.org/index.cfm>

Department of Labor

Disability Program Navigators (DPNs)/ Disability Resource Coordinators (DRCs) provide comprehensive services to people with disabilities seeking resources and support with work incentives in DOL One Stop Centers. One Stop Centers provide job seekers with job listings, job finding workshops, and access to computers, copiers, and fax machines. <http://www.doleta.gov/disability/DPN.cfm>

SOAR (SSI/SSDI Outreach, Access, and Recovery) Website

The SOAR TA Center has gathered a number of employment resources and links for your reference. Check out the *Brief Overview of SSI/SSDI Work Incentives!* <http://bit.ly/2cqaFj2>

Disability.gov

Disability.gov provides one-stop online access to disability-related resources, services, and information available throughout the federal government. <https://www.disability.gov/>



SAMHSA SOAR Technical Assistance Center
<https://soarworks.prainc.com/>

Get Housing Providers Involved

- Invite housing providers to be a part of your local SOAR planning group
- Contact your local housing authority and develop a list of affordable housing options
- Contact your state's department of housing for additional resources and a list of supportive housing providers
- Contact your local HUD Continuum of Care to discuss potential collaborations

Sharing What's Possible

SOAR Successes

Connect with Us

Visit our website: <http://soarworks.prainc.com>

SAMHSA SOAR TA Center

Policy Research Associates, Inc.
345 Delaware Avenue
Delmar, New York 12054
(518) 439 – 7415

Washington State SOAR TA Center Liaison

Pam Heine, MSW, LSW
(pheine@prainc.com/x5228)