

SSI/SSDI Outreach Access and Recovery (SOAR)

STRATEGIES FOR SUCCESSFUL IMPLEMENTATION



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PRESENTERS:

KIM DAVIDSON, LCSW; RODNEY HARRIS; MARGARET SMITH, MSW

Who is in the room?

Raise your hand if:

- Your agency currently uses SOAR
- You are SOAR trained
 - Cohort model?
- You haven't worked with SOAR yet and are here to learn more



Housekeeping Items

If possible, silence phones during the presentation

Quietly exit the room if a break is necessary

If leaving early, leave completed evaluation and nametag in designated area before you go

Save all questions until the end of the presentation; there will be time for Q&A

Part 1: SOAR Basics

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 (2017), \$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

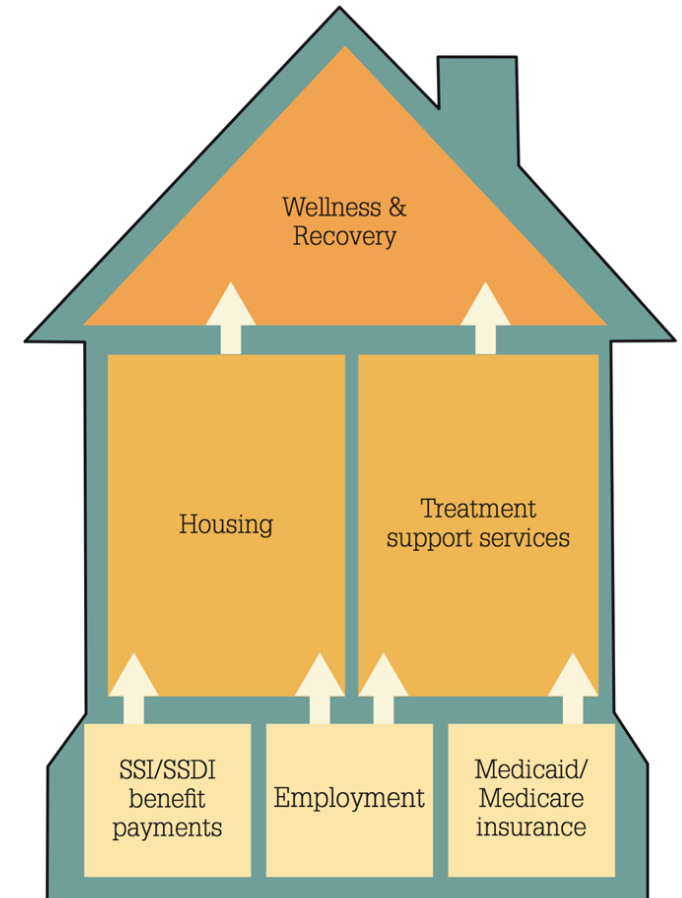
Definition of Disability

1. Medically Determinable Physical or Mental impairment
 - Illness must either meet or be equivalent to the “listing” criteria used by Disability Determination Services (DDS). Supporting information must be documented in medical records
2. Duration
 - The impairment tied to the illness(es) must have lasted OR be expected to last 12 months or more OR be expected to result in death
3. Functional Information
 - Applicants must demonstrate that significant functional impairment related to the illness(es) exists that impede their ability to work

Substantial Gainful Activity (SGA) = \$1,180 (2018)

Why is SSI/SSDI Important for Individuals?

- Provides access to:
 - Income
 - Housing
 - Health Insurance
 - Treatment
 - Supportive services
- Builds a foundation for recovery:
 - Ending homelessness
 - Decreasing incarcerations and hospitalizations
 - Increasing employment opportunities



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
- Creating MSR (letter of support) that describes impairment based on medical records and practitioner experience
- Tracking Outcomes (OAT)
- 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)

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

SOAR Online Course

- Offers standardized training
- <http://soarworks.prainc.com>
- 20 hours to complete & 20 CEU's
- 7 classes (from SOAR 101 to work incentives!)
- Practice case overview
- Submission of the practice case
- Cohort model – why it's important!

About the Course

Articles & Content

Practice Case Demonstration

What is SOAR?

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
 - Meet Your Client - Practice Case
- 2. Initiating the Application**
- 3. Exploring Basic Eligibility**

&

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.

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 Case Study - Female, Part 1

(Video player showing a woman's face)

Cohort Experience

Rodney Harris

Revive Center for Housing & Healing

Part 2: SOAR Implementation Lessons from an Agency Perspective

Kim Davidson, LCSW

Why implement SOAR at your agency?

- ▶ In an environment where resources are limited we want to give our staff all of the knowledge they need to navigate our systems
- ▶ SOAR is an easy way to provide:
 - ▶ Additional information about the social security process
 - ▶ Tools to staff to reduce burnout
 - ▶ An easy way to talk to participants around benefits
 - ▶ A staff development opportunity

Who to Train

- ▶ With an online training program, it is easy to have staff get trained
 - ▶ Takes 20 hours
 - ▶ To incentivize the training, you can be flexible about how you complete it
 - ▶ Sample application is embedded within
 - ▶ Can even do it with a real app, not using identifying information

You can:

- ▶ Train a whole case management team together
 - ▶ Benefits: Can support each other in the process, can plan implementation together that works, can universalize the TA, applicants can apply with staff that they have a strong relationship with
 - ▶ Challenges: Takes time away from the whole team, not doing many applications so you forget things over time

Who to Train

You can:

- ▶ **Train a staff member who will complete all applications**
 - ▶ Benefits: they will get to know the process well, can prioritize and focus efforts
 - ▶ Challenges: Participants may not trust the staff to disclose information, may not have the history, takes away from other duties
- ▶ **Train an intern to complete all applications**
 - ▶ Benefits: Free labor, great educational experience, they have the time to focus their efforts
 - ▶ Challenges: Different level of accountability, rapid turnover

To save time..

▶ Divide up the duties

- ▶ Have interns obtain medical records

▶ Prioritize how you use SOAR

- ▶ Don't use all of the tools for every case
 - ▶ Just use the knowledge to learn the listings and how to demonstrate
 - ▶ For medical cases you can use some tools but not full MSR
 - ▶ When there is a lot of documentation you can use a letter of support
 - ▶ Use a full SOAR application with the most challenging cases

▶ Find a workflow that works for you

- ▶ Once staff are trained, break down the steps to see how you can streamline them at your agency

Build spaces within your agency for success

- ▶ Ensure that supervisors are trained even if they don't complete applications
 - ▶ Use supervision to discuss applications
 - ▶ Have supervisors review the MSR
- ▶ Build a relationship with TA staff
 - ▶ Have them come to meetings to answer questions
 - ▶ Have them review MSR's that you are concerned about
- ▶ Find ways to track applications internally
 - ▶ OAT
 - ▶ HMIS as an option
 - ▶ Another system that works for you!
 - ▶ Helps you better understand your income outcomes
 - ▶ Helps you track success
- ▶ Create a system for training new staff

Success Strategies for Staff

- ▶ A stronger relationship leads to a stronger application
 - ▶ And follow through
- ▶ When medical providers are on board, it helps tremendously
- ▶ Find ways to make this easier on staff
 - ▶ Off-site completion
 - ▶ Incentives
 - ▶ Lots of support
 - ▶ Peer sharing
- ▶ Do an in-person training too
- ▶ Take advantage of trainings and TA opportunities
- ▶ Make it work for you
 - ▶ Using some of the skills is still better than not using any of them
 - ▶ Let staff do it their way

Lessons Learned

- ▶ This isn't 100%
 - ▶ There are still denials
 - ▶ Don't overpromise
 - ▶ Be honest from the start
 - ▶ Be prepared to hand off appeals if you believe you have done all that you can
- ▶ Not all adjudicators even know (or care) what SOAR is
 - ▶ It's okay.. It still builds a stronger application
- ▶ Start small and slow
 - ▶ Avoid burnout
 - ▶ This takes a long time
 - ▶ Can still advertise, but target it..
- ▶ Even if you don't use every step you can still benefit from SOAR
 - ▶ All CM's use differently



Part 3: SOAR's Progress in our System

Margaret Smith, MSW



SOAR Technical Assistance Background

Chicago's past SOAR efforts have included starts and stops

SOAR TA Center released Technical Assistance RFA to CoCs in November 2016

Goal of TA: Assist CoC to establish community infrastructure and collaborations needed to implement a coordinated SOAR initiative

All Chicago applied on behalf of Chicago CoC and was awarded TA

Included in grant: one-day planning meeting with community stakeholders, facilitated by SOAR TA Center

TA has reinvigorated Chicago SOAR initiative

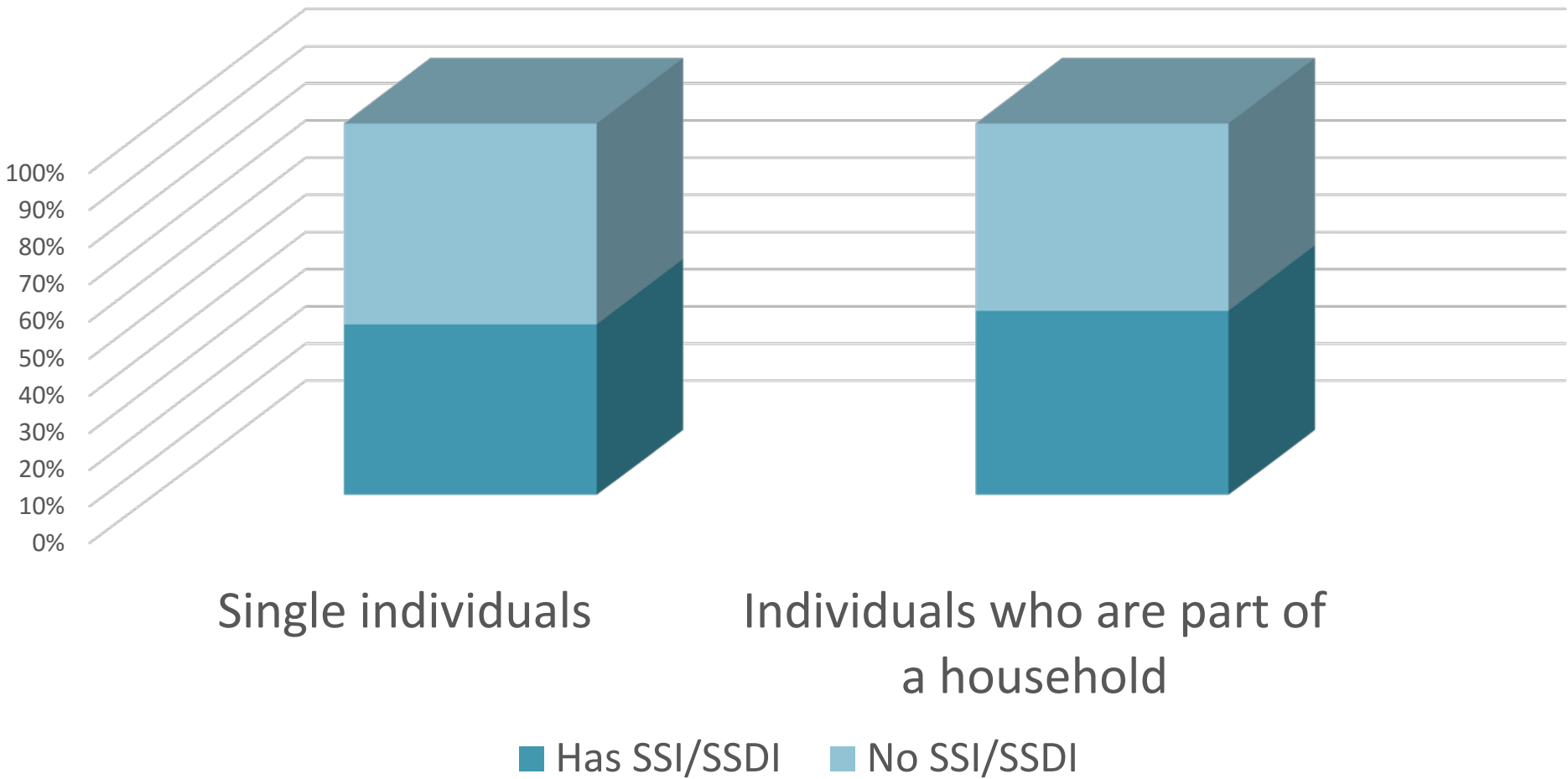


Need for SOAR in our System

Individual or Family	Income	No SSI/SSDI	Has SSI/SSDI
Individuals with disability	Earned income under \$1170 (SGA - functional eligibility)	7,274	6,184
	Income under \$735	6,256	
Persons with disability who are part of a family	Earned income under \$1170	587	578
	Income under \$735	432	

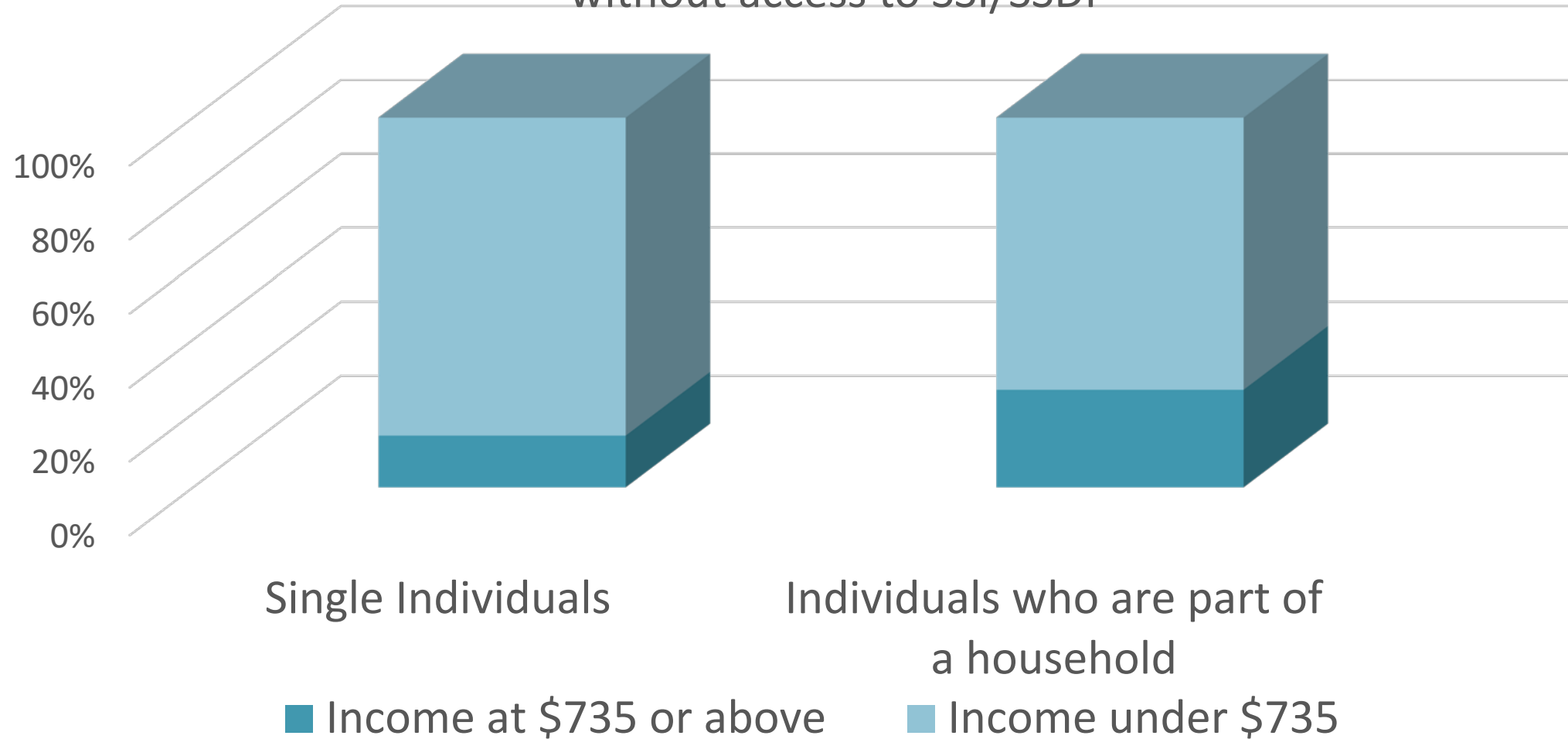
Need for SOAR

Individuals with a disability in HMIS earning less than SGA (\$1,170)



Need for SOAR

Individuals with a disability in HMIS earning less than SGA (\$1,170),
without access to SSI/SSDI



SOAR Action Plan

Chicago's SOAR TA included a one-day planning meeting to create a SOAR action plan (May 2017).

Action Plan Objectives:

- Form successful SOAR Steering Committee that meets regularly
- Gain buy-in from agencies, identify who to train, complete 100 applications
- Ensure tracking of outcomes in OAT; obtain funding for 3 dedicated SOAR providers
- Build and maintain successful relationships with SSA/DDS & medical providers

SOAR Steering Committee

- SOAR Steering Committee was initiated September 2017
- **Purpose: To serve as oversight body for Chicago's SOAR initiative and collaborate with All Chicago to coordinate execution of Action Plan goals and objectives**
- *Three subcommittees*



Next Steps

Data collection – baseline to guide our work - survey

Semiannual SOAR Online Course Cohorts

Full-day Fundamentals Trainings for those who have passed the SOAR Online Course

SSI/SSDI 101 Sessions quarterly

Sign-up sheet available being passed around for those who would like to stay informed



Questions?



...Before you go

Please complete The Learning Center feedback survey

*Your feedback is truly helpful to us! Your responses help shape
our work and impact what and how we offer trainings.*

Thank you!