

## SSI/SSDI OUTREACH, ACCESS, AND RECOVERY: AN OVERVIEW



### THE ISSUE

Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) are disability income benefits administered by the Social Security Administration (SSA) that also provide Medicaid and/or Medicare health insurance to eligible individuals. The application process for SSI/SSDI is complicated and difficult to navigate. Nationally, about 28 percent of individuals who apply for these benefits are approved on initial application and appeals take an average of 1 year to complete.

For people who are experiencing or at-risk of homelessness or who are returning to the community from institutions (jails, prisons, or hospitals), access to these programs can be extremely challenging. Approval on initial application for people who experiencing or at-risk of homelessness and who have no one to assist them is about **10-15 percent**. For those who have a mental illness, substance use issues, or co-occurring disorders that impair cognition, the application process is even more difficult – yet accessing these benefits is often a critical first step in recovery.

### A SOLUTION

The Substance Abuse and Mental Health Services Administration (SAMHSA) developed the SSI/SSDI Outreach, Access, and Recovery (SOAR) model to address this critical need. SOAR-trained case managers submit complete and quality applications that are approved quickly. The SOAR TA Center provides a three-step approach to SOAR implementation:

#### STRATEGIC PLANNING



Strategic planning meetings bring key state/local stakeholders (e.g., SSA and Disability Determination Services (DDS); State Mental Health Agency and Department of Corrections leadership; and community homeless, health, and behavioral health providers) together to **collaborate and agree** upon a SOAR process for the submission and processing of SSI/SSDI applications and **develop** an action plan to implement their SOAR program.

#### TRAINING LEADERS



Training of case managers using the **SOAR Online Course**. This free, web-based course includes the development of a practice case using a fictional applicant. A **Leadership Academy** program creates strong local leaders to support SOAR-trained case managers and coordinate local SOAR programs.

#### TECHNICAL ASSISTANCE



Individualized technical assistance for supporting **action plan implementation**, identifying funding opportunities for **sustainability**, developing **quality review** procedures, and assisting with **tracking outcomes** to document success and identify areas for improvement and expansion.

### OUTCOMES



Since 2006, over **31,356** initial SOAR SSI/SSDI applications have been approved.



The 2016 approval rate on initial SOAR applications averages **67 percent** in **101 days**.



In 2016 alone, SSI/SSDI brought at least **\$317,641,152** into the economies of the participating localities

## What Does it Take to be a SOAR Provider?

*You want to get involved with SOAR? That's great! Here's what to expect.*

### Training

The SOAR Online Course trains people to assist individuals with disabilities who are experiencing or at-risk of homelessness to apply for the Social Security Administration (SSA) disability programs: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).

- The course is free and is located on the SOARWorks website (<https://soarworks.prainc.com>).
- The course 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 participants to apply what they have learned by completing a sample SSI/SSDI application packet for a fictitious applicant using SOAR techniques.
- It takes approximately 16-20 hours to complete the course and participants can work at their own pace, starting and stopping as they wish. However, we encourage students to complete the course 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 Fundamentals refresher trainings to review key components of the course, discuss local/state practices and connect new providers to local 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 how seasoned the SOAR worker is. For example, engagement with an applicant who is incarcerated or residing in a state hospital 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 components<sup>1</sup> and submitting high quality applications. Use of these components statistically increases the likelihood of an approval on initial applications for those who are eligible<sup>2</sup>. The five SOAR critical components of application assistance are:

- Serve as the applicant's appointed representative using the SSA-1696 Appointment of Representative form.
- Complete all required SSA application forms online, when available.
- Collect medical records, assessments, case management notes and collateral information.
- Write a comprehensive Medical Summary Report that includes psychosocial, treatment, and functional information and is co-signed, when possible, by a treating physician or psychologist.
- Perform quality review of applications prior to submission.

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<sup>1</sup> <https://soarworks.prainc.com/article/soar-model-key-components>

<sup>2</sup> Based on data from January 15, 2005 to February 14, 2014 extracted from the SOAR Online Application Tracking (OAT) system. Data includes 4,200 application outcomes from 35 states.

## Follow-Up

The work of a SOAR provider does not end after submitting an application. SOAR providers are expected to:

- Communicate regularly with SSA and DDS regarding the status of applicants' claims.
- Continue ongoing outreach with applicants to stay connected throughout the determination process.
- Help individuals obtain other needed services (e.g. housing, employment, physical/mental health care).

## Outcome Tracking

Tracking SOAR outcomes is a critical way to document successes and target technical assistance needs.

- Use the SOAR OAT (Online Application Tracking) system or your state's preferred method to track applications submitted, critical components used, approvals/denials, and time to decision (i.e. from application submission to receipt of SSA's decision).
- Tracking outcomes is an essential piece of funding and sustainability efforts.

## Local Involvement

Many SOAR communities have local steering committees and/or SOAR practitioner meetings. Getting involved locally can be a great way to connect with others who are doing similar work. You can seek support, obtain refresher training and help with growing and expanding your local SOAR initiative.

- Find your state and local SOAR leads on the SOAR website here:  
<https://soarworks.prainc.com/directory>