SOARing' on the path to recovery

SSI/SSDI Outreach, Access, and Recovery

What is SOAR

SSI/SSDI Outreach, Access, and Recovery (SOAR) is a program designed to increase access to Social Security Administration (SSA) disability benefits for eligible individuals who are experiencing or at risk of homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder.

Identifying SOAR Applicants

Identifying adults who are experiencing or at risk of homelessness who may be eligible for Social Security Administration (SSA) disability benefits is an integral aspect of the SOAR model. While we do not want to discourage anyone from applying for SSA benefits, this tool can help you identify individuals that most need your assistance with their application.

SOAR Eligiblity Criteria

Applicant has a serious mental illness or exhibits symptoms and/or has serious physical illnesses that affect his/her ability to work at a substantial gainful level ($1,180/month in 2018)

The illness(es) or condition(s) have lasted or are expected to last for at least 12 months or are expected to result in death Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevents sustainable employment. For example:

- Psychotic Symptoms (positive or negative)
- Depressive Symptoms (decreased energy, lack of motivation, suicide attempts)
- Manic Symptoms (racing thoughts, disorganized thoughts)
- Anxious feelings (paranoia, nervousness)
- Cognitive deficits (brain injury; problems with concentration, memory, etc.)
- History of trauma (history of abuse, posttraumatic stress disorder, etc.)

For applicants with mental illness, he/she has marked restrictions in at least 2 of these functional areas**:

- Understand, remember, or apply information (memory, following instructions, solving problems, etc.)
- Interact with others (getting along with others, anger, avoidance, etc.)
- Concentrate, persist, or maintain pace (as they relate to the ability to complete tasks)
- Adapt or manage oneself (hygiene, responding to change, setting realistic goals, etc.)

The SOAR Model: Critical Components

Serving as the Applicant's Representative

Applicants experiencing homelessness may not have a phone or a place to receive mail.

The SSA-1696: Appointment of Representative form is used to authorize the case manager as the applicant's representative. The completion of this form allows the case manager to receive copies of all notices mailed to the applicant, communicate directly with SSA and DDS to provide additional information needed, and obtain records from the applicant's SSA application file.

Collecting and Submitting Medical Records

Without the help of SOAR, DDS must solicit records from treatment providers reported by the applicant. The applicant may not provide sufficient information and/or it can take a long time for providers to respond to DDS.

DDS examiners must base their determinations on the medical and other evidence available. In order to provide SSA/DDS with sufficent medical evidence of the applicant's disability, SOAR case managers collect and submit medical records as part of the SSI/SSDI application. This ensures that SSA and DDS receive the information that they need to make a decision. Through communication with the applicant, as well as community collaborations with local providers and hospitals, SOAR case managers can often access medical records faster and ensure that the information is relevant and complete.

The SOAR Model: Critical Components cont'd

Writing and Submitting a Medical Summary Report (MSR)

The DDS examiner will never meet the applicant - this is an opportunity for the SOAR case manager to tell the applicant's "story."

The Medical Summary Report (MSR) is a SOAR signature tool and key to a successful application. It is a letter written by the case manager, and submitted to SSA as part of the SOAR application packet. The MSR provides an overview of the applicant's life story and how they came to be in their current circumstances. It provides a succinct, comprehensive summary of the applicant's medical treatment history and describes any functional impairments that stem from psychiatric or medical conditions and affect their ability to work.

FY 2017-2018 SOAR Local Outcomes

Northeast Florida

LSF Health Systems

NE FL Region

# of applications Approved	116	**Approval Rate** **56%**
# of applications Denied	90	**Avg Days to Decision** **103**

Retroactive Payments Received

$287,239

Circuit 4 - Duval

# of applications Approved	40
# of applications Denied	46

Approval Rate
47%

Avg Days to Decision
91

Retroactive Payments Received
$58,223

SOAR 2017 National Outcomes

SOAR WORKS
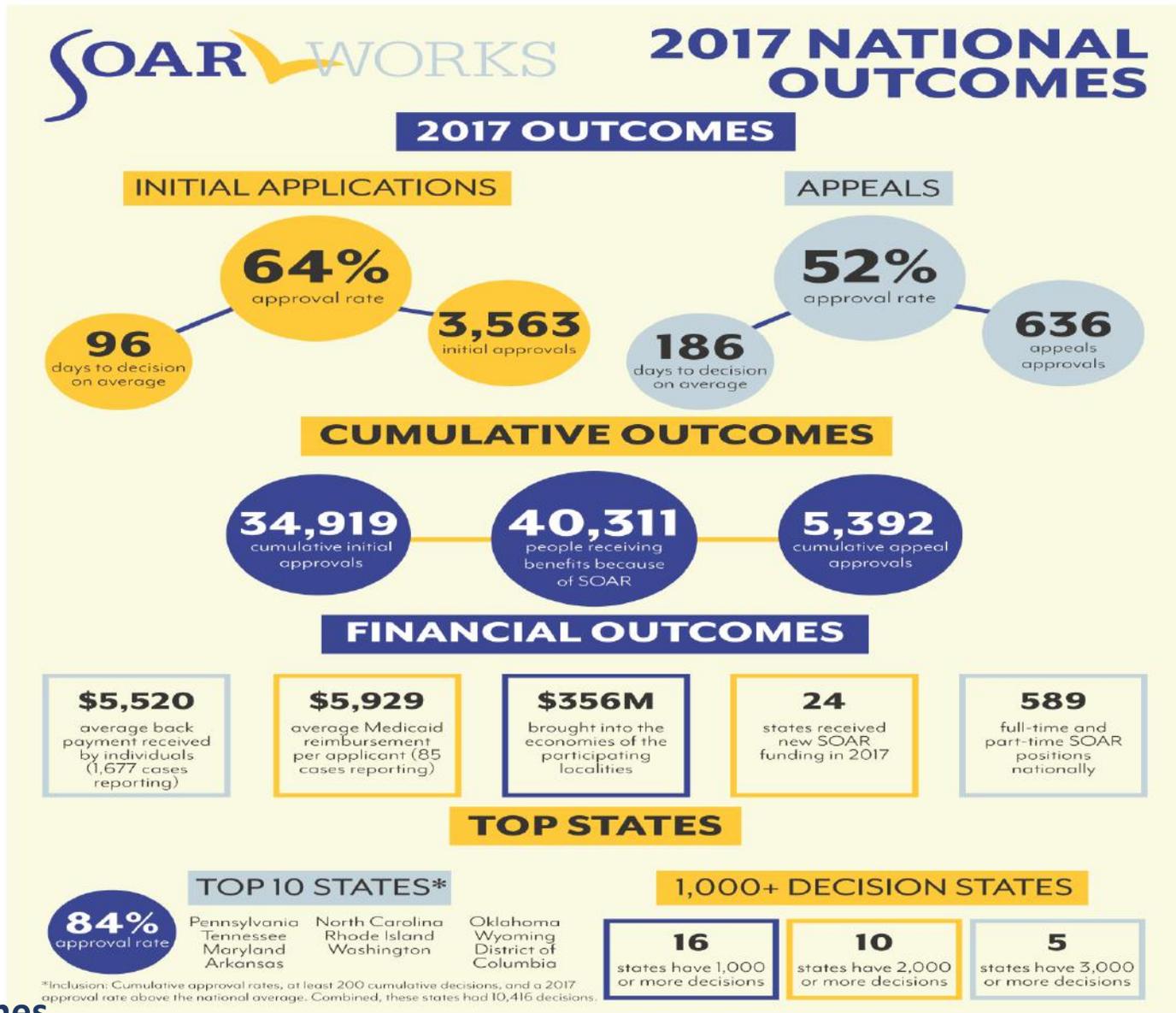
SOAR Enhances Recovery by
Empowering Local Communities

Through the dedicated work of the SAMHSA SOAR TA Center, state and local SOAR Leads, and benefits specialists, the **SOAR model has assisted over 40,311 people** with serious mental illness in receiving SSI/SSDI benefits, enabling these individuals to access stable housing, gain mental health and substance abuse treatment, and pursue their vocational goals.

SOAR Collaborates with Communities to Develop Customized On-Site Technical Assistance Events

SAMHSA SOAR TA Center staff deliver technical assistance in collaboration with local key stakeholders, using a grassroots approach that **empowers each locality to identify its needs** and receive individualized assistance to work towards its identified goals

Since 2009, the SAMHSA SOAR TA Center has delivered on-site technical assistance to over **169 localities** across the United States

Using this approach, the SAMHSA SOAR TA Center has reached over **5,070 local stakeholders** across the United States

SOAR Develops Local Leaders Through the Leadership Academy Model

24

From 2013 to 2018, the SAMHSA SOAR TA Center facilitated 24 **regional SOAR Leadership Academies**

613

Leadership Academies have provided **skills training and mentorship** for 613 SOAR Local Leads from all 50 states and Washington, DC

1,400

These Local Leads have in turn facilitated **85 SOAR Online Course Review Sessions** with over 1,400 local participants

SOAR Works with Local Communities to Develop Funding and Sustainability Plans for Long-Term Success

Communities develop **funding and sustainability plans** for SOAR assistance, in collaboration with the SAMHSA SOAR TA Center

Each locality is offered technical assistance and **individualized support in identifying funds** that could be used for SOAR

These efforts have resulted in **589 full-time and part-time SOAR positions** nationally

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SOAR WORKS

SOAR Enhances Recovery by
Scaling Federal Resources to Enhance Communities

Through its national reach and extensive network of partnerships, the SAMHSA SOAR TA Center is able to scale federal resources to fit the needs of community members. The SAMHSA SOAR TA Center tracks its impact at the local level to demonstrate the efficacy of its model.

The SOAR Online Course is a Standardized Training Module that is Enhanced with Individualized Feedback

5,500

Between 2014 and April 2018, over 25,000 trainees enrolled in the course and almost **5,500 people have successfully completed** the SOAR Online Course

8,500

Experts from the SAMHSA SOAR TA Center have completed over **8,500 individual reviews** of trainees' work

1:1

Each trainee in the SOAR Online Course receives **comprehensive, individualized feedback** from an expert in the SOAR model

22,600

The SAMHSA SOAR TA Center shares SOAR-related news, events, and resources with over **22,600 indivduals** via the SOAR listserv

OAT
The SOAR Online Application Tracking Tool Tracks National Outcomes to Demonstrate Local Impact

28,000+
SOAR-assisted SSI/SSDI applications reported in OAT

3,112
users registered in OAT

1,527
agencies registered in OAT

A peer-reviewed evaluation using OAT data found that disability applications that used the SOAR model had a higher likelihood of approval than applications that did not

Source: An Evaluation of SOAR: Implementation and Outcomes of an Effort to Improve Access to SSI and SSDI, Jacqueline F. Kauff, Elizabeth Clary, Kristin Sue Lupfer, and Pamela J. Fischer, Psychiatric Services 2016 67:10, 1098-1102. https://doi.org/10.1176/appi.ps.201500247

The SAMHSA SOAR TA Center Works in Collaboration with Federal and National Agencies on Efforts to End Homelessness

88

Since 2009, the SAMHSA SOAR TA Center has held 88 partner webinars and presentations to expand the reach of SOAR

Through extensive partnerships with the U.S. Department of Veterans Affairs (VA), the SOAR model is now VA's recommended approach for increasing access to SSI/SSDI for Veterans who have disabling conditions

378

VA Medical Center staff and VA grantee staff (Supportive Services for Veteran Families and Grant and Per Diem Program) have passed the SOAR Online Course

Ticket to Work

How It Works

Ticket to Work connects individuals with free employment services to help them decide if working is right for them, prepare for work, find a job or maintain success while working. If the individual chooses to participate, they will receive services such as **career counseling, vocational rehabilitation, and job placement and training** from authorized Ticket to Work service providers, such as Employment Networks (EN) or their state Vocational Rehabilitation (VR) agency.

Ticket to Work

Making Timely Progress

Taking the agreed-upon steps toward employment within Social Security's timeframes is called making "timely progress" towards:

Receiving the education and training you need to succeed at work and yourlong-term career

Becoming and staying employed

Reducing your dependence on SSDI or SSI payments

Earning your way off cash benefits, if possible

Why SOAR works so well

- Get info up front, before application made
- Screener provides info that is crucial
- DDS and SSA don't wait for records
- SOAR compiles records early on, ahead of the game
- SOAR processor facilitates communication between SSA/DDS and client

Bibliography

- "SOAR Outcomes and Impact" by SAMHSA SOAR TA Center https://soarworks.prainc.com/article/soar-outcomes-and-impact