



SOAR and DDS: Key Partners in Ending Homelessness for Individuals with Disabilities

SSI/SSDI Outreach, Access, And Recovery

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Disclaimer

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What is SOAR?

- SSI/SSDI Outreach, Access, and Recovery (SOAR)
- Focuses on people who are experiencing or at risk of homelessness
- A model for assisting individuals to apply for SSI/SSDI
- Sponsored by SAMHSA in collaboration with SSA since 2005
- SOAR is active in all 50 states; no direct funding is provided to states
- SOAR TA Center helps states and communities by providing technical assistance and training



Changing Lives Since 2005

- **31,356** persons experiencing or at risk for homelessness have been approved on initial application, and an additional **4,756** have been approved on appeal
- **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
 - Top 10 states have served over 9,400 individuals, average **84%** approval





SSI/SSDI and Homelessness

- Lack of a stable address and/or telephone number can result in lost documentation and missed appointments
- Often lack required identification and documentation
- Limited access to ongoing health care services may result in incomplete records and inability to document a disability
- Many people experiencing homelessness often do not complete the SSI/SSDI application process, experience longer application and processing times, or have their applications denied due to lack of information



Key Strategies for Connecting People Experiencing Homelessness to SSI and SSDI Benefits

- Developed in 2015 by USICH, SSA, SAMHSA, and VA
- Provides guidance to the field on key strategies for linking eligible adults to benefits
- Intended to improve practice and collaboration among SSA field offices, VAMC staff, and other organizations and community-based partners
- Found at www.usich.gov

Key Strategies for Connecting
People Experiencing Homelessness
to Supplemental Security Income
(SSI) and Social Security Disability
Insurance (SSDI) Benefits





Five Key Strategies

1. Assisting people experiencing homelessness with the SSI/SSDI application process
2. Coordination with SSA field offices, DDS, community organizations, and other federal agencies
3. Coordination with other benefits and entitlements
4. Working with Veterans and other special populations
5. Assisting SSI/SSDI beneficiaries post-entitlement



SOAR Application Assistance

- Participate in comprehensive, free, online SOAR training
 - <http://soarworks.prainc.com>
 - 20 hours to complete – comes with 20 **free** CEUs from NASW upon successful completion
 - Strong emphasis on SSA's definition of disability and required documentation
 - Includes the completion of a full SSI/SSDI application for a fictional applicant





SOAR Application Assistance

- Use outreach to identify individuals experiencing homelessness who may be eligible for SSI/SSDI
- Become the applicant's SSA-1696 Appointed Representative
- Help claimant create a "my Social Security" account and obtain ID
- Collect medical evidence needed to determine a claimant's medical eligibility
- Write a Medical Summary Report (MSR): narrative about the claimant's symptoms and functioning
- Use the Online Disability Application and Electronic Records Express



SOAR and Community Coordination

- The SOAR Process establishes communication with designated SSA field office and DDS representatives
 - Describes how to compile complete applications, including all required forms, medical records, and MSRs, to reduce duplication of effort with the DDS and to reduce the need for consultative exams (CEs)
 - Promotes electronic submission of all available SSA documents and medical records
 - Includes a quality assurance checklist with each SOAR-assisted claim
- SOAR aims to strengthen system-wide communication and collaboration





SOAR Collaborations in Michigan

- The Michigan DDS has a representative (“SOAR DDS Agency Lead”) who participates in the SOAR State Planning Group
- The SOAR DDS Agency Lead sends a monthly receipts and close-outs report to the State SOAR Lead, showing how many claims were submitted by region and also what claims were decided and if denied, the reason for denial
 - This report assists with communication and quality review
- They have 4 DDS offices and each has a “SOAR DDS Office Liaison” who troubleshoots any issues that arise and attends local meetings



SOAR Collaborations in Michigan

- Michigan has "SOAR DDS Examiners" in each of the offices that process the SOAR claims
 - The claims are flagged at SSA with a homeless flag and “SOAR” in the remarks
- Providers use specific cover sheets for SSA and DDS when submitting materials to each office
 - Established a process for getting the bar-coded cover sheet when DDS receives the SOAR-assisted application from SSA
- As of 2016, over 2,000 individuals in MI have been approved for SSI/SSDI using the SOAR model at the initial and appeal levels





Maryland DDS/SOAR Partnerships

- The Maryland SOAR Initiative has a long-standing partnership with the DDS Medical Relations Director
 - Develop communications procedures, ensure MD cases are adjudicated in the state whenever possible, and maintain high quality standards
- Maryland DDS nominated 10 DDS Examiners who process all of the SOAR claims
- As of April 2017, SOAR in MD has assisted over 1,000 individuals
 - Overall approval rate on initial application of 82% in an average of 78 days



Open DDS/SOAR Communication in MD

- All SOAR service providers receive training from DDS on Sequential Evaluation, Blue Book listings, and materiality
- Along with the dedicated State SOAR Lead, there is a Local SOAR Lead in each county
 - Each county meets regularly to hold a steering committee meeting and SSA/DDS attend as available
- DDS has a list of all SOAR-trained providers and will contact the SOAR Lead if there is an issue with a provider (e.g. not returning phone calls or not submitting quality applications)





Collaboration with DDS: Medical Documentation

- SOAR-trained case managers begin collecting medical records when they start to work with an applicant
 - All or most of the records are ready to submit as soon as the DDS examiner is assigned
- Through engagement, can help identify additional medical sources
- Case managers develop relationships with local medical providers, to assist in obtaining records
 - Collaborate with DDS if they are unable to obtain particular records



Collaboration with DDS: Medical Documentation

- Using the bar code, records go straight into applicant's file
 - DDS has all the medical documentation right away, which can speed up adjudication of claim
- Allows for much more comprehensive applications, and may reduce need for consultative examinations and avoid technical denials
- Allows for DDS to highlight if additional information is needed in any area and SOAR case manager can ensure that more evidence is obtained, if available





Takeaways from *Key Strategies*

- The SOAR model helps increase access to SSI/SSDI for individuals who are homeless and have disabling conditions
- Community collaborations between SOAR and SSA/DDS are organized differently in each state
 - Result in higher-quality SSI/SSDI applications and a reduction in consultative exams and technical denials
- Expanding and strengthening our partnerships is necessary to achieve an end to homelessness for individuals who are eligible for SSI/SSDI



Next Steps

- Find out about SOAR initiatives in your state at <https://soarworks.prainc.com/directory>
- Gather more information:
 - *Key Strategies*: <https://www.usich.gov/tools-for-action/key-strategies-for-connecting-people-experiencing-homelessness-to-ssi-ssdi>
 - *SOAR Guide to SSA and DDS Collaborations*: https://soarworks.prainc.com/sites/soarworks.prainc.com/files/SSA_DDS_Collaboration_Guide_072017_FINAL.docx
- Reach out with any questions!





Contact Us

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