SOAR Online Course
Overview and Objectives

Overview

The SOAR (SSI/SSDI Outreach, Access and Recovery) Online Course trains case managers to assist individuals who are experiencing homelessness to apply for the Social Security Administration (SSA) disability programs: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). The techniques taught in this online course can improve the quality and completeness of any application for SSI/SSDI, however, the label "SOAR" should only be used on SSI/SSDI applications for persons who are homeless or at risk for homelessness.

The SOAR Online Course consists of seven classes, each of which has a series of articles, short quizzes, and a practice case. This practice case provides an opportunity for case managers to apply what they have learned by completing an SSI/SSDI application packet for a fictitious applicant using SOAR techniques. Video interviews, medical records, and progress notes provide the information needed to complete SSA forms and write a Medical Summary Report (MSR) for the applicant. The complete application packet is submitted to the SOAR Technical Assistance (TA) Center for review. Upon approval, the participant will receive a certificate of completion and 16 Continuing Education Units (CEUs) from the National Association of Social Workers (NASW). There is no charge for this course.

We estimate that it will take about 16 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 and get connected sooner to local SOAR initiatives.

Learning Objectives

Class 1: The Need for SOAR
The Need for SOAR provides an introduction to SOAR, its values, and the roles and responsibilities of key stakeholders, especially case managers.
- Why SOAR is an important tool for case managers to use when assisting people who are experiencing or at-risk of homelessness and who have a mental illness, co-occurring substance use disorder or other disability apply for SSA disability benefits
- What values inform the SOAR process
- Important community organizations and stakeholders necessary for a successful SOAR effort and the roles they play
- An overview of SSA's disability benefit programs, SSI and SSDI
- Key steps in the disability application process

Class 2: Initiating the Application
Initiating the Application describes strategies to engage an applicant in the application process. It also stresses two key components in the SOAR program – becoming the applicant's representative and collecting medical evidence.
- Effective strategies for case managers to use in engaging the applicant they are assisting
- Importance of becoming the applicant's representative
- SOAR strategies for collecting medical evidence
- Ways of establishing the protective filing date and starting the application process

Local SOAR Action Planning
Guidelines for Stakeholders

#1. COMPLETING APPLICATIONS AND TRAINING

- Identify programs that will participate in your community pilot of SOAR and engage agency administrators to support and implement SOAR in their programs.
  - ✓ Can programs enhance or re-configure staff to create/expand an SSI/SSDI effort?
  - ✓ Are there outreach workers in the community that can assist with SSI/SSDI applications?
- How will you identify who will be trained in SOAR and complete applications?
  - ✓ Do the identified staff have the time to undertake the training and complete applications?
- How will you utilize the SOAR online course to support training in your area?
- When, where, and how will you provide follow-up support to trainees? How can you utilize the SOAR Fundamentals materials?
  - ✓ Are there local SOAR leaders in the state/community that can assist?
- How can you assure that the applications submitted to SSA are consistent and high quality?

#2. COLLABORATIONS

a. *Collaboration with SSA and DDS*
  - Negotiate a specific referral process with SSA and DDS. Consider including:
    - ✓ MOUs between community providers assisting with applications so that expectations and commitments are clear
    - ✓ Training community providers to complete the SSI application on an outreach basis
    - ✓ SSA gives community providers a *maximum* of 60 days to gather medical documentation, write a Medical Summary Report, and submit the full application packet
    - ✓ Identify SSA and DDS liaisons for SOAR in local offices
    - ✓ SSA "flags" SOAR applications and forwards them to designated DDS SOAR liaison
  - How can SSA and DDS participate in the SOAR steering committee and provide feedback about the SOAR process and quality of submitted applications?

b. *Collaboration with Medical Providers*
  - Get buy-in from health care providers that treat homeless persons in the community.
  - Set up a process to obtain medical records from essential providers.
    - ✓ Can you arrange to obtain medical records without charge?
  - Identify area hospitals, primary care clinics and mental health centers that do or could provide needed assessments or evaluations to support SSI/SSDI applications including Healthcare for the Homeless providers.
  - Arrange for psychiatric evaluations; consider using medical or graduate school students.
  - Explore possibility of using retroactive Medicaid to reimburse for medical evaluations.

c. *Other Collaborations*
  - Who else needs to be included as part of SOAR (e.g., Continuum of Care, shelters or outreach programs, Mayor's Office, local homeless coalitions, local prisons or jails)?
  - How will you address the need for representative payee services?

# The Conventional SSI/SSDI Application Process and the SOAR Process

The Conventional Process

- Applicants experiencing homelessness often have difficulty completing SSA forms & gathering evidence

- Without a stable address, they often fail to receive forms or appointment notifications from SSA, resulting in technical denials

- If DDS is unable to obtain medical records, applicants need a Consultative Exam, resulting in application delays or a denial if the applicant misses the appointment

The SOAR Process

- SOAR-trained caseworkers gather medical records and assist the applicant with completing all SSA forms

- SOAR caseworkers communicate with SSA & DDS to ensure the application is complete

- The SOAR Medical Summary Report documents how an applicant's illnesses impair his/her ability to work

- Applicants experiencing or at-risk for homelessness receive application assistance free of charge through SOAR

Applicants experiencing homelessness who do not receive assistance to apply for SSI/SSDI have an estimated approval rate of 10-15% on initial application.

15%   65%   82%
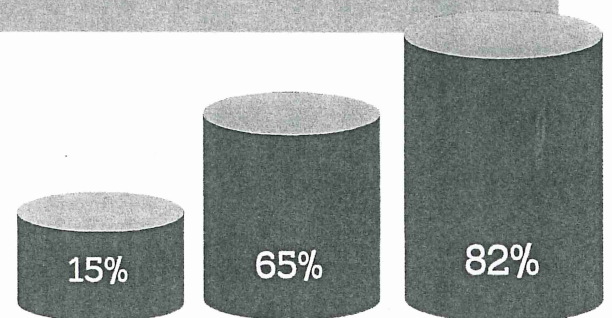
Complete, high-quality applications using the SOAR model are processed more quickly and result in higher approval rates

Nationally, 65% of SSI/SSDI applications using the SOAR model are approved at the initial level. The top 10 SOAR states have an average approval rate of 82%.

For more information about SOAR, please visit our website at http://soarworks.prainc.com/ or email soar@prainc.com

$\int$OAR ARIZONA

SOAR Ends Homelessness and Supports Recovery – SOAR increases access to disability income benefit programs for eligible adults experiencing homelessness who have a mental illness and/or a co-occurring substance use disorder. SOAR ends homelessness through increased access to SSI/SSDI income supports.

1 SOAR = Income and Housing

SOAR provides the means to maintain housing and generates money for the local economy.

In 2015 alone, clients who worked with the State's ONLY full-time dedicated SOAR Case Manager in Maricopa County:

- 86% secured housing
- $167,815.99 received in back-payments from 2015 initial applications
- SSI/SSDI monthly amounts spread across a full year would generate over $275,000 to the local economy

2 SOAR Success in Arizona

SOAR-trained staff prepare comprehensive, quality SSI/SSDI applications that are quickly approved.

Arizona's average number of days to a decision for all claims submitted in 2015 was only 66 days with 74% of claims approved upon initial application. Compare this to the national average of 28% for homeless and non-SOAR applications.[1]

74%

28%

SOAR-Assisted SSI/SSDI Approvals

Non-SOAR SSI/SSDI Approvals

3 SOAR Reduces Institutionalization

SOAR facilitates re-entry efforts through access to housing and disability income.

The Lodestar Day Resource Center in Phoenix has developed an agency-specific pre-release agreement with the Social Security Administration to identify individuals in jail or DOC to be able to submit SSI/SSDI applications 90 days prior to release. Developing a similar process may be available for future full-time dedicated SOAR Case Managers.
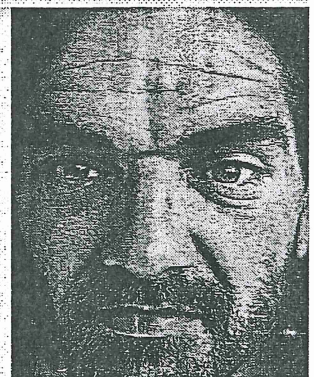
SOAR Works!

"Thank you for my daughter back."
– *Mother of SOAR applicant who was connected to SSI benefits, SMI level of care, and housing in just 34 days.*

"SOAR is a fire-starter. Be creative. Remember that it doesn't just end homelessness, it provides new opportunities for someone who couldn't have done it without you. It provides a path for people to feel like a person again: Whole with a voice that matters."
– *Loren Gallegly, Maricopa County Local SOAR Lead*

"You've kept me alive."
– *SOAR applicant*

[1] SSI Annual Statistical Report, 2014. (October 2015). SSA Pub. No. 13-11827. Washington, D.C.: Social Security Administration.

SOAR Online Course Trainings

September, 2016
SOAR-Certified by County

Series 1

County	Value
Apache	0
Coconino	7
Cochise	5
Gila	1
Graham	0
Greenlee	0
LaPaz	0
Maricopa	81
Mohave	6
Navajo	0
Pima	31
Pinal	0
Santa Cruz	0
Yavapai	11
Yuma	1
Unknown	10

■ Series 1