# SSI/SSDI Outreach, Access, and Recovery (SOAR): Pennsylvania Balance of State Continuum of Care Presentation

Substance Abuse and Mental Health Services Administration (SAMHSA) SOAR Technical Assistance Center

Policy Research Associates, Inc.

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# Disclaimer

*The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).*

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## Today's Presentation

- Provide a brief overview of SOAR and the SOAR process.

- Discuss the SOAR critical components

- Share how various states and communities have successfully implemented SOAR

- Question and Answer

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## What is SOAR?

- A model for assisting eligible individuals to apply for Social Security Administration (SSA) disability benefits

- For individuals who are experiencing or at risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities

- Sponsored by SAMHSA in collaboration with the Social Security Administration (SSA) since 2005

- All 50 states and Washington, DC currently participate

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## SSI and SSDI: The Basics

### Supplemental Security Income (SSI)

- Eligibility based on need: low income and resources; living arrangement
- Monthly amount based on Federal Benefit Rate: $914/month (2023)
- Date of eligibility based on Protective Filing Date/Application Date
- Health insurance: Medicaid

### Social Security Disability Insurance (SSDI)

- Eligibility based on insured status (FICA payments)
- Monthly amount based on earnings history
- Date of eligibility based on "date of onset" of disability, 5 month waiting period
- Health insurance: Medicare

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*https://www.ssa.gov/ssi/text-general-ussi.htm

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## SSI/SSDI Eligibility: Definition of Disability for Adults

### SSA's Definition of Disability

Medical Condition(s)

- Diagnosis
- Documentation
- Duration

Functional Impairment(s)

- Severity
- Work
- SGA

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## SOAR Across the Lifespan

### Children

- Birth to age 18

- Eligible for SSI only

- How does the child's functioning compare to a child of the same age who does not have impairments

### Youth and Young Adults

- Age 18-24

- Eligible for SSI and/or SSDI (Disabled Adult Child)

- Application evaluated under the adult definition of disability

- Redetermination

- Youth aging out of foster care

### Adults

- Age 18+

- Eligible for SSI and/or SSDI

- Is the applicant able to work and earn at a substantial gainful level?

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## A Foundation for Recovery and Resiliency

### More Than Income

- Access to more robust health care and housing

- Increased education and employment opportunities

- Decrease in incarcerations and hospitalizations

- Ability to maximize income

### SSI/SSDI: One Brick in Foundation



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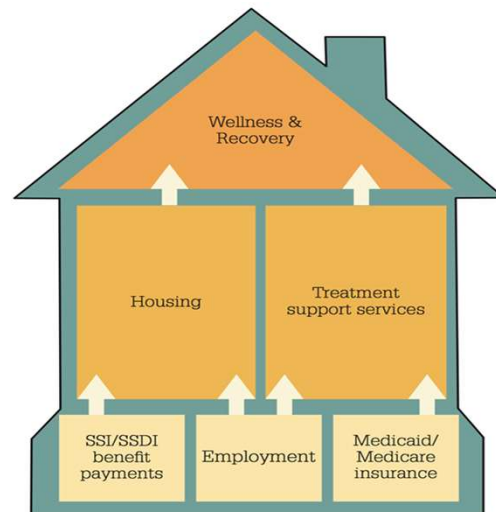
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## How do States and Communities Benefit?

SSI and Medicaid bring federal dollars into states, localities, and community programs:

- Health providers can recoup cost of uncompensated care.
- States and localities can recoup the cost of public assistance.
- Cash benefits and back payments received by individuals is spent in the local community *(2021: $564 million\*).*

  \* *https://soarworks.samhsa.gov/article/soar-outcomes-and-impact*

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## Who is a SOAR Applicant?

*We want to ensure that ALL eligible applicants are served appropriately.*



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## What Makes SOAR Unique?



SOAR-trained case workers are the heroes!

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## SOAR Works!
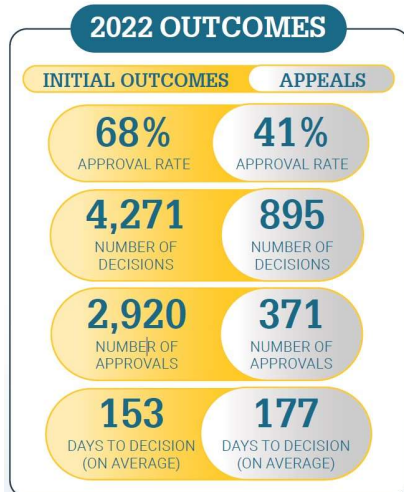


*National SOAR outcomes as of June 30, 2022
https://soarworks.samhsa.gov/about-the-model/oat-and-outcomes

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## 2022 Financial Outcomes



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## SOAR Super Stars!



*Inclusion: Highest cumulative approval rates on initial application for states with at least 300 cumulative decisions, at least 24 decisions in 2022 (2 per month), and a 2022 approval rate above the national average.

14 **Combined, these states had 20,551 decisions**

## Pennsylvania State Outcomes

- Pennsylvania
  - 346 SOAR-assisted applications
  - 91% approval rate
  - 102 average days to decision
- Philadelphia
  - 218 SOAR-assisted applications
  - 97% approval rate
  - 72 average days to decision
- Pittsburgh
  - 113 SOAR-assisted applications
  - 82% approval rate
  - 149 average days to decision
- Outcomes from other areas: 45 decisions

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## SOARWorks Pennsylvania: Looking Forward

- Continue to grow SOAR throughout the state, emphasizing the BOS counties

- Establish additional SOAR Local Leads

- Gain additional funding for SOAR dedicated staff

- Increase the number of SOAR assisted applications statewide

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## The SOAR Online Course

**SOAR Online Course: Adult Curriculum**
This course trains case workers to assist adults (age 18+) who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for the Social Security Administration's (SSA) disability programs, Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).

**SOAR Online Course: Child Curriculum**
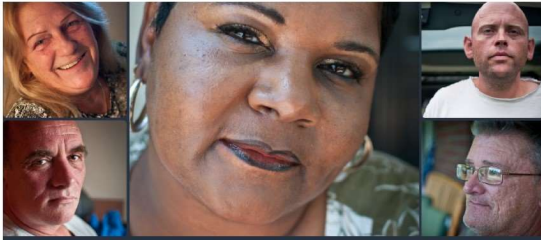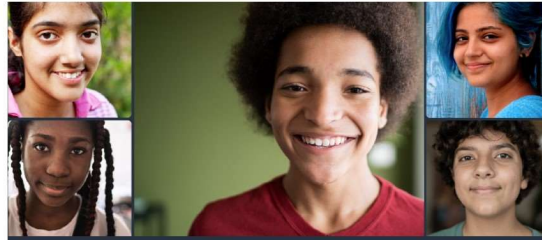This course trains case workers to assist children (under age 18) who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for Supplemental Security Income (SSI), a Social Security Administration (SSA) disability benefit program.

- Standardized training provided across all geographic areas
- SOAR Leaders can coordinate follow-up training and support
- Course is FREE, web-based, and self-guided
- 20 CEUs from National Association of Social Workers (NASW)

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## The Training and Becoming Involved

- Emphasis on being able to commit time to complete and submit quality applications
- 20-40 hours per complete application
- Completing all SOAR critical components
- Tracking outcomes

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**Getting Involved with SOAR**
*You want to be a SOAR provider? That's great! Here's what to expect.*

SOAR promotes recovery and wellness through increased access to Social Security disability benefits for eligible individuals who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR providers assist individuals with complete and quality applications. This is not an easy task, and we want to be sure that you understand the commitment required – we believe it is well worth the effort!

Training
The SOAR Online Course trains providers to assist individuals with the Social Security disability application process. The course includes an Adult Curriculum for assisting with Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) claims for adults and a Child Curriculum for assisting with SSI claims for children.
- The SOAR Online Course: Adult and Child Curriculums are free and are located on the SOARWorks website (https://soarworks.prainc.com/content/soar-online-course-catalog).
- Each curriculum 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 trainees to apply what they have learned in the course by completing a sample application packet for a fictitious applicant using SOAR techniques.
- It takes approximately 20 hours to complete each curriculum and participants can work at their own pace, starting and stopping as they wish. However, we encourage students to complete the curriculum 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 Online Course Review Sessions to review key components of the curriculum, discuss local/state practices, and connect new providers to local Social Security Administration (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 the experience level of the SOAR worker. For example, engagement with an applicant who is residing in an institution 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[1] and submitting high quality applications. Use of these components significantly increases the

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# Successful SOAR Communities

Collaboration is key!

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## Successful Outcomes Occur When:

- Persons assisting with applications are SOAR-trained and implement the model
- There is an eligible applicant

  SOAR Tool: *Identifying SOAR Applicants*

- Providers are offered ongoing support
- There is collaboration between SSA, DDS, and the SOAR provider
- Communication between SOAR partners is maintained

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## Community Collaborations
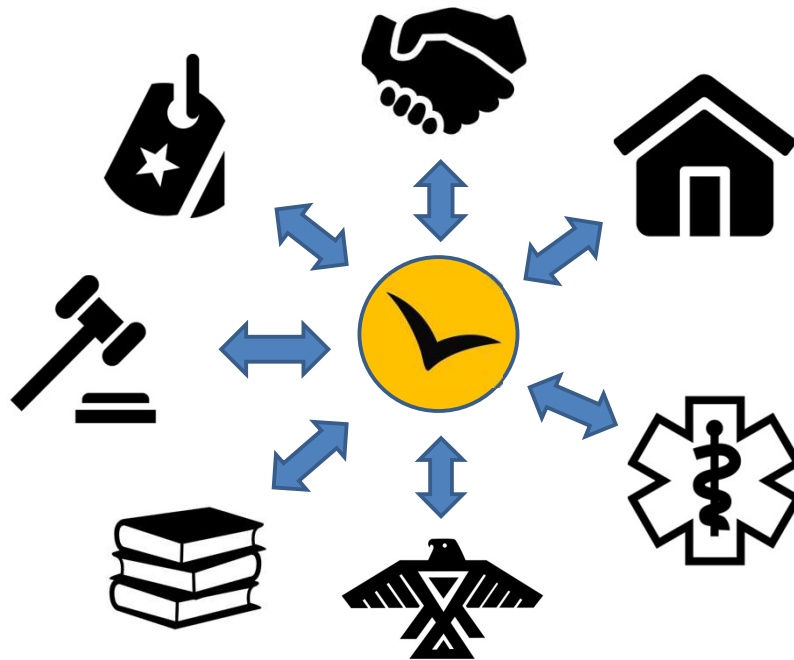


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## The SOAR Critical Components

- As the applicant's representative a SOAR-trained case worker works collaboratively with the applicant to submit a complete SSI/SSDI application:
  - Regular communication with the applicant
  - Extensive engagement process
  - Clearly link the applicant's diagnoses to their functional limitation
  - Case worker will communicate regularly with SSA and DDS, and provide additional information when needed



**SOAR Critical Components**

Using these five SOAR Critical Components, case workers play a central role in gathering complete, targeted, and relevant information for SSA and DDS, resulting in high-quality SSI/SSDI applications. These components significantly increase the likelihood of an approval for those who are eligible.

1. Serving as the Applicant's Representative
2. Collecting and Submitting Medical Records
3. Writing and Submitting a Medical Summary Report (MSR)
4. Obtaining a Co-signature on the MSR by an Acceptable Medical Source
5. Completing a Quality Review of Applications Prior to Submission

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## The SOAR Critical Components

- Serving as the applicant's SSA-1696 representative allows the case worker to apply for and represent the applicant.
- Caseworkers will collect and submit all the applicant's medical records; this ensures that DDS has the records and is a critical part of the Medical Summary Report (MSR).
- Write a 5-7 page MSR that clearly links the applicant's diagnoses to their functional limitations and ability to work.
- A co-signature by an Acceptable Medical Source (AMS) makes the MSR medical evidence.
- Submitting complete and quality applications is the reason SOAR works!

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## Funding for SOAR

- Dedicated funding is not required to begin/grow a SOAR initiative, but it is helpful.
- Funding for dedicated SOAR case workers is the eventual goal.
- Successful SOAR outcomes will increase the likelihood of dedicated funding.
- Discussions about funding should be held early and often.

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## Funding SOAR Programs

- All 50 states participate in SOAR by:
  - Reallocating existing resources
  - Securing funding through federal and state grants and foundation funding
  - Establishing collaborations with hospitals. legal settings, or other specialty funding
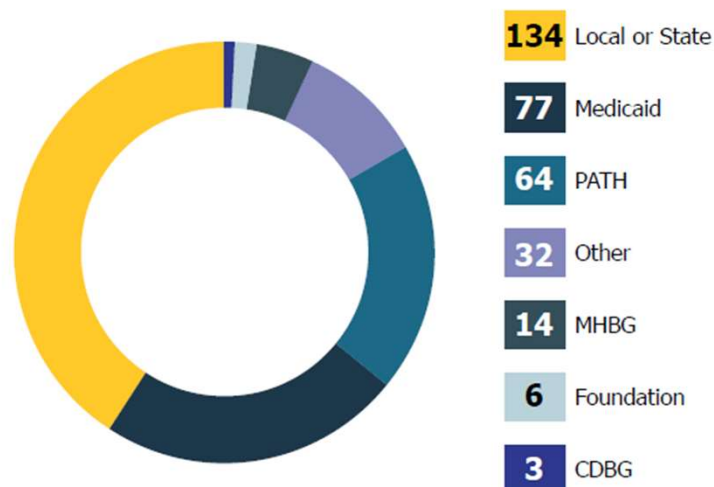
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## 2022 Funding Sources

### 330 Full-Time Dedicated SOAR Positions



| | |
|---|---|
| 134 | Local or State |
| 77 | Medicaid |
| 64 | PATH |
| 32 | Other |
| 14 | MHBG |
| 6 | Foundation |
| 3 | CDBG |

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## Virginia SOAR Initiative

- Upon completion of the SOAR Online Course trainees attend a two day/session Virginia SOAR Certification course, where they learn the Virginia SOAR process, and are introduced to their SOAR Local Leads and SSA/DDS contacts.

- Local Leads are available in each area of the state for support; they mentor new trainees and perform quality review.

- The SOAR State Team Lead and Local Leads also regularly review data in OAT and provide an updated list of SOAR-trained case workers to SSA and DDS.

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## State or County General Assistance (GA)

- GA funds offer time-limited cash benefits to adults without dependents who have limited or no income
  – These benefits are not available in every state

- Through an Interim Assistance Reimbursement (IAR) agreement, SSA can reimburse state or local public assistance funds when individuals begin receiving SSI
  – In 2022, states reported average reimbursements of **$1,686 per person**

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## Successful Models: North Carolina

- Combined funding streams from: foundations, hospitals, local, state, and federal
- Focus on helping localities develop and sustain benefits specialist positions
- 31 FTEs and 8 PTEs or Volunteer in 18 counties
- 3,112 applications, 76% approval rate, in 2021

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## SOAR and University Social Work Programs

- Partnerships between SOAR and University Social Work programs can yield great results!
- Incorporate SOAR into university level BSW or MSW coursework.
- Work with the social work field placement office to place SOAR-trained students within agencies or allocate a field placement to be SOAR dedicated.
  - Poverello Center in Missoula, Montana trains their MSW/BSW interns to complete SOAR applications.
  - University of Texas, Arlington and University of California, Long Beach incorporate the SOAR Online Course into their curriculum.

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## Integrating SOAR with Peer Certification

- SOAR trained peer workers can play a vital role in increasing agency capacity to serve more applicants, provide support to existing SOAR trained staff, and improve quality of applications.
- The requirements for certifying peer support specialists vary by state, and certification bodies range from state government entities to independent non-profit organizations.
- Collaborating with Peer Certification Boards to integrate SOAR within the Peer Certification Process is a viable strategy for supporting SOAR work in your community!

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## Wrapping Up

- SOAR is worth the effort!
- Timely access to Social Security Disability Benefits changes lives
- SOAR can work within your community!
- The SAMHSA SOAR TA Center, SOAR State Team Lead, and SOAR Local Leads are here for support!

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## Questions?

Question & Answer

Open Discussion



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## Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

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