Pennsylvania Mainstream Benefits Training

SOAR (SSI/SSDI, Outreach, Access, and Recovery)

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).

Purpose and Objectives

- Share the importance of Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) benefits
  - Including income, health insurance, education and employment supports, and housing stability
- Offer opportunities for community members to get involved with SOAR
  - Connecting to local SOAR efforts, the SOAR Online Course, and the SOAR Online Application Tracking (OAT) program

What is SOAR?

SOAR WORKS

- 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: $943/month (2024)
- 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

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

SSI/SSDI Eligibility: Definition of Disability for Adults

SSA's Definition of Disability

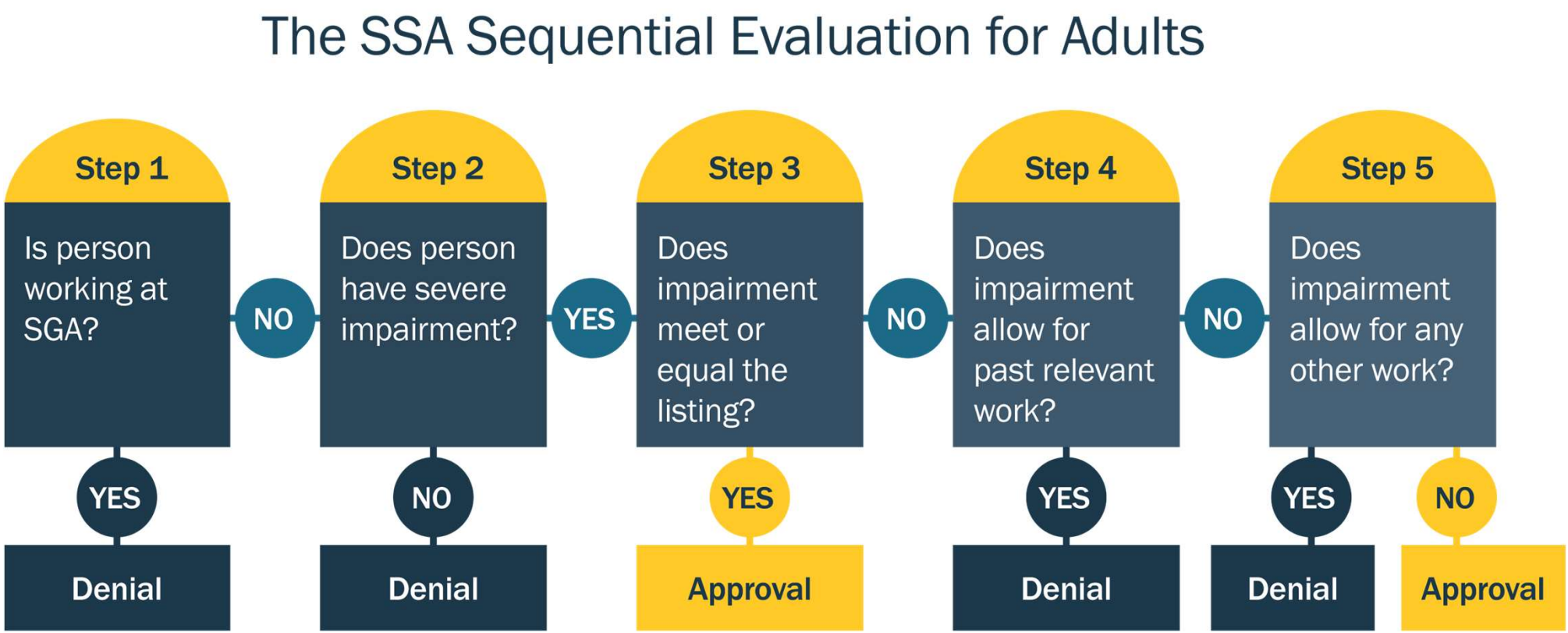
Medical Condition(s)

- Diagnosis
- Documentation
- Duration

Functional Impairment(s)

- Severity
- Work
- SGA

Sequential Evaluation



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SOAR is for Everyone

SOAR Works across the lifespan, with diverse populations, and within complex systems.

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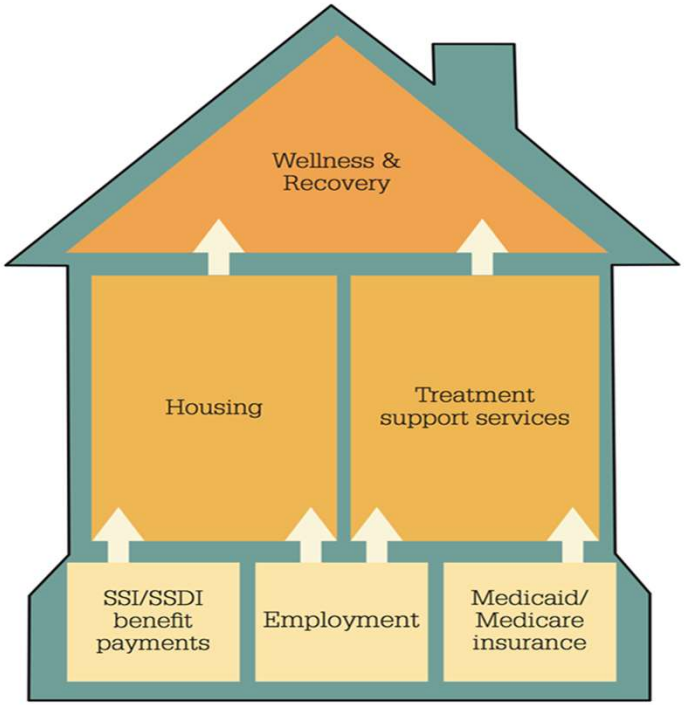
A Foundation for Recovery and Resiliency

More Than Income

- Access to health care and housing
- Increased education and employment opportunities
- Decrease in incarcerations and hospitalizations

SSI/SSDI: One Brick in Foundation



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How do States and Communities Benefit?

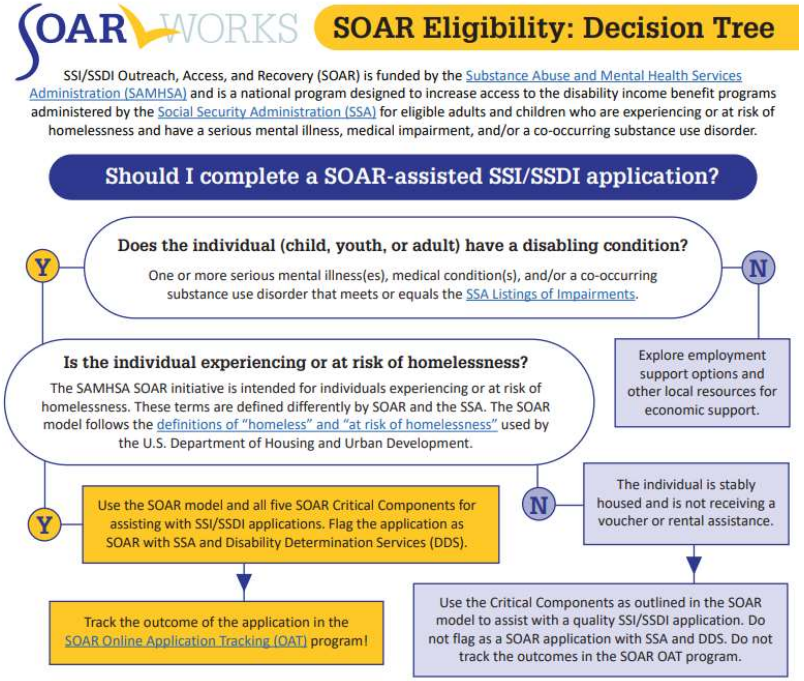
SSI and Medicaid bring federal dollars into states, localities, and community programs:

- 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 *(2023: $717 million*).*

* *https://soarworks.samhsa.gov/about-the-model/oat-and-outcomes*

Who is a SOAR Applicant?

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



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Reducing Implicit Bias and DEI Considerations for Identifying SOAR Applicants

The SAMSHA SOAR TA Center is working to reduce the influence of implicit bias and encourage diversity, equity, and inclusion during the process of identifying potential applicants to assist with SOAR-assisted SSI/SSDI applications. Included are helpful tips to consider when utilizing the *Identifying SOAR Applicants* tool. This guidance asks you to consider how a potential applicant's racial, ethnic, and cultural views regarding disabilities, diagnoses, symptoms, and treatment as well as their socioeconomic and homelessness status may factor into a SOAR caseworker's decision to assist them with a SOAR-assisted SSI/SSDI application.

The overarching questions we encourage you to ask yourself are:

- Am I only assisting individuals with SOAR-assisted SSI/SSDI applications who have a formally diagnosed mental and/or physical health condition(s) and who are currently engaged in treatment?
- Am I "screening out" potential SOAR applicants who may qualify for SSI/SSDI benefits, but do not yet have a formal diagnosis and have not yet received treatment?

Eligibility Criteria	Information to Consider
Key Eligibility Criteria for SSA Disability Benefits	▪ Are there racial, ethnic, or cultural reasons why a potential applicant may not consider themself as someone who has a disability, serious mental illness, or has mental health symptoms? ▪ Are there reasons such as current mental health symptoms/impairments and education level which may prevent a person from being able to accurately describe their illness, symptoms, and functional limitations? ▪ Are there engagement and communication strategies that you can employ when working to identify a potential SOAR applicant that keep these considerations in mind?
SOAR Recommends: Characteristics that may Strengthen an SSI/SSDI Application	▪ Are there racial, ethnic, or cultural reasons why a potential applicant might not be taking psychiatric medications? ▪ Are there racial, ethnic, or cultural reasons why a potential applicant might not be receiving psychiatric treatment for their mental illness or medical conditions? Is there community stigma associated with mental illness or, [illegible] has mental health symptoms? ▪ Are there reasons such as current mental health symptoms/impairments and education level which may prevent a person from being able to accurately describe their illness, symptoms, and functional limitations? ▪ Are there engagement and communication strategies that you can employ when working to identify a potential SOAR applicant that keep these considerations in mind?
SOAR Recommends: Characteristics that may Strengthen an SSI/SSDI Application	▪ Are there racial, ethnic, or cultural reasons why a potential applicant might not be taking psychiatric medications? ▪ Are there racial, ethnic, or cultural reasons why a potential applicant might not be receiving psychiatric treatment for their mental illness or medical conditions? Is there community stigma associated with mental illness or physical disability they are currently or have historically experienced? ▪ Does the potential applicant have significantly less access to psychiatric and/or medical treatment in their community that may be related to their race, ethnicity, culture, or socioeconomic status? ▪ Has the potential applicant been unable to access psychiatric and/or medical treatment due to their lack of income, lack of health insurance, and/or homelessness status? ▪ Before "screening out" a potential applicant who does not take psychiatric medications and does not yet have obtainable medical evidence, can you employ any outreach strategies that may assist this potential applicant with accessing this treatment or an assessment for their illness(es)/condition(s)?

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What Makes SOAR Unique?

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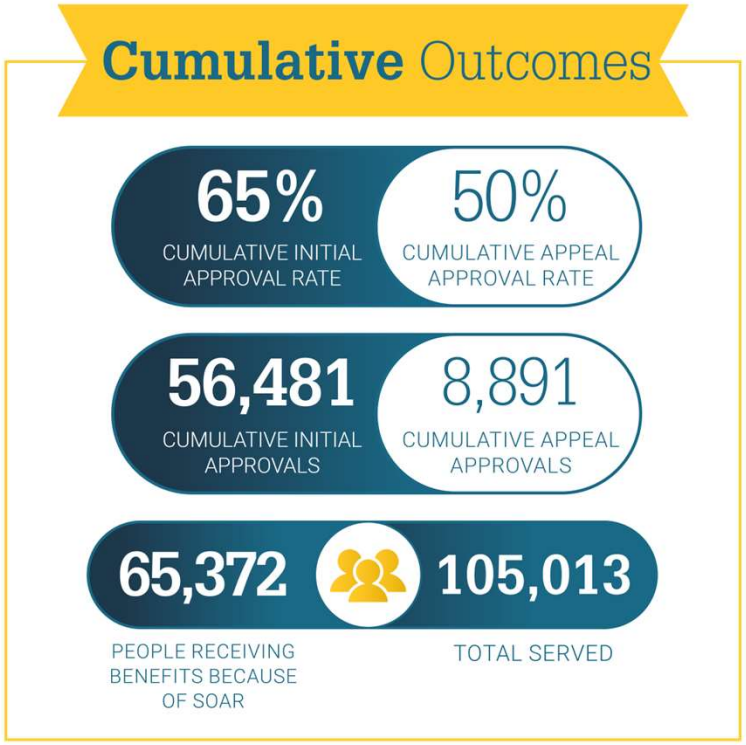
SOAR Works!



*National SOAR outcomes as of June 30, 2023

https://soarworks.samhsa.gov/about-the-model/oat-and-outcomes

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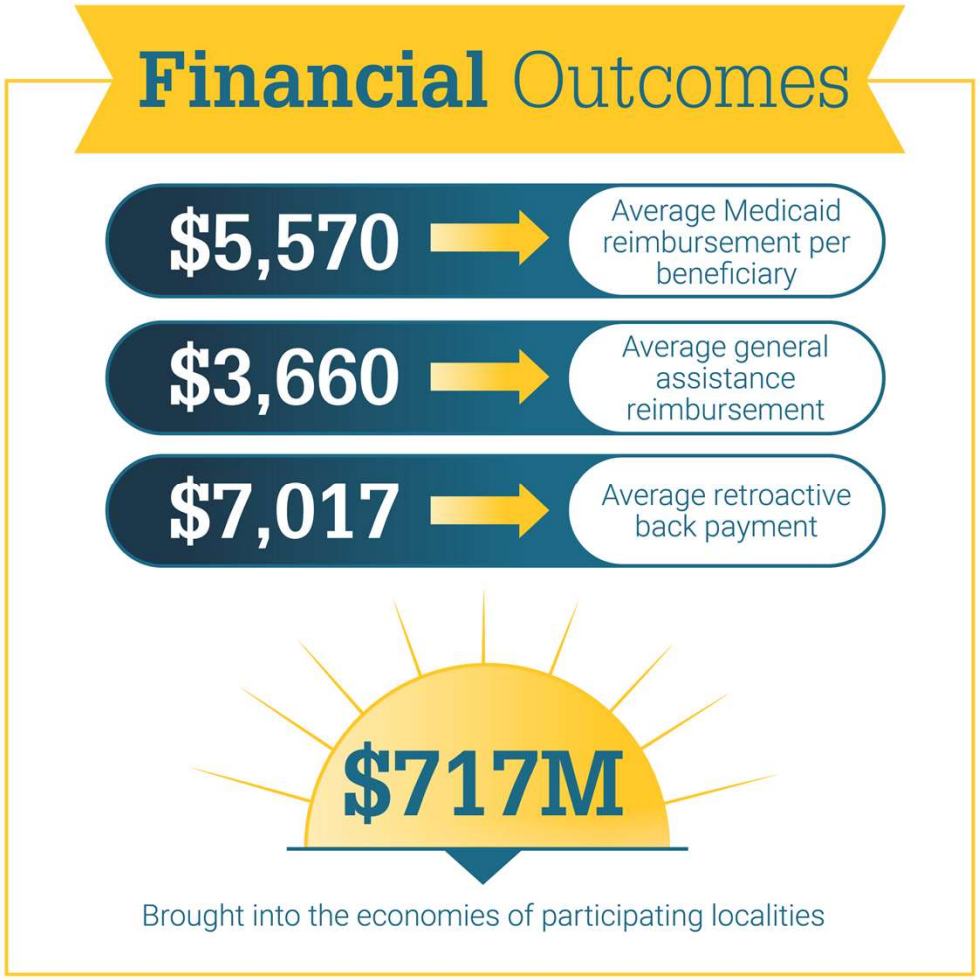
2023 Financial Outcomes



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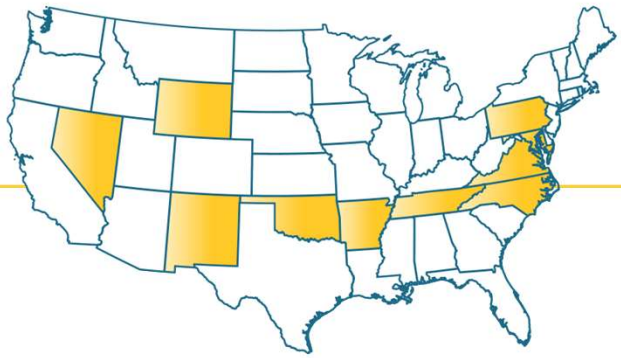
SOAR Super Stars!

Top States

81% APPROVAL RATE

TOP 10 STATES*

Tennessee	Wyoming
Pennsylvania	Oklahoma
Maryland	Virginia
Arkansas	Nevada
North Carolina	New Mexico



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**

*Inclusion: Highest cumulative approval rates on initial application for states with at least 250 cumulative decisions, at least 24 decisions in 2023 (2 per month), and a 2023 approval rate above the national average.

Combined, these states had 22,245 decisions

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SOAR Leadership Structure

SOAR TA Center

- Facilitates strategic planning meetings
- Conducts Leadership Academies, webinars, & learning communities
- Develops resources, including SOARWorks, the SOAR Online Course, and OAT
- Provides TA at all stages of SOAR implementation

State Team Lead

- Facilitates state steering committee
- Directs plans to grow & sustain statewide activities
- Serves as liaison to localities
- Maintains relationships with SSA & DDS
- Submits SOAR outcomes to the TA Center

Local Lead

- Facilitates local steering committee
- Directs local implementation plans
- Facilitates SOAR Online Course cohorts
- Conducts SOAR Online Course Review Sessions
- Ensures quality applications & reports outcomes

Case Manager

- Completes high-quality SSI & SSDI applications using the SOAR model
- Communicates with local SSA & DDS representatives
- Tracks application outcomes

*OAT: Online Application Tracking Program
*DDS: Disability Determination Services
*TA: Technical Assistance

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Oh, the support you will receive!

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Benefits of the SOAR Online Courses

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

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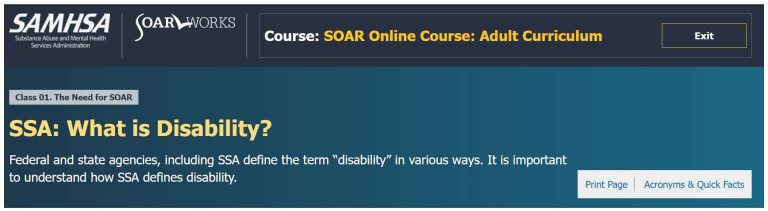
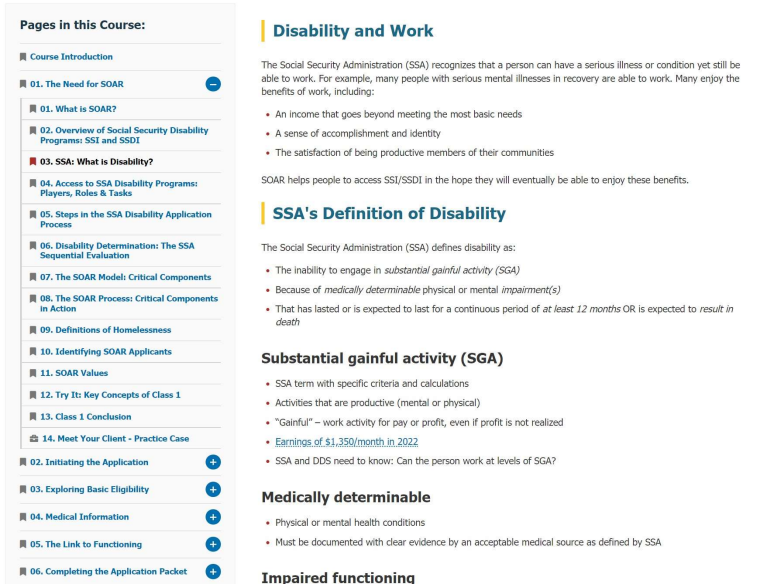
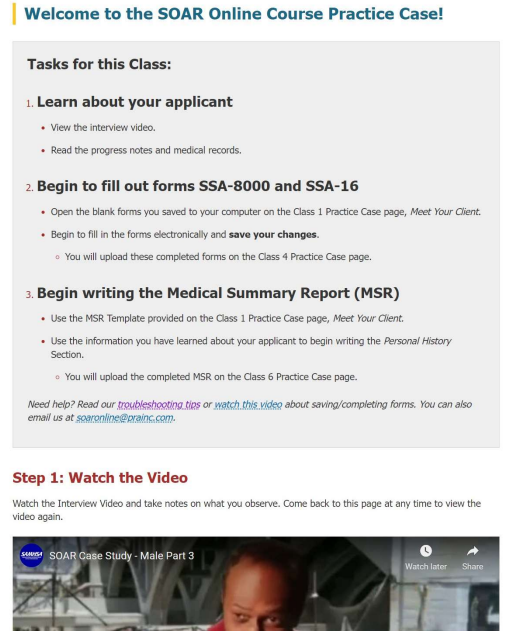
SOAR Online Course: Articles and Practice Case

Articles and Content





Practice Case



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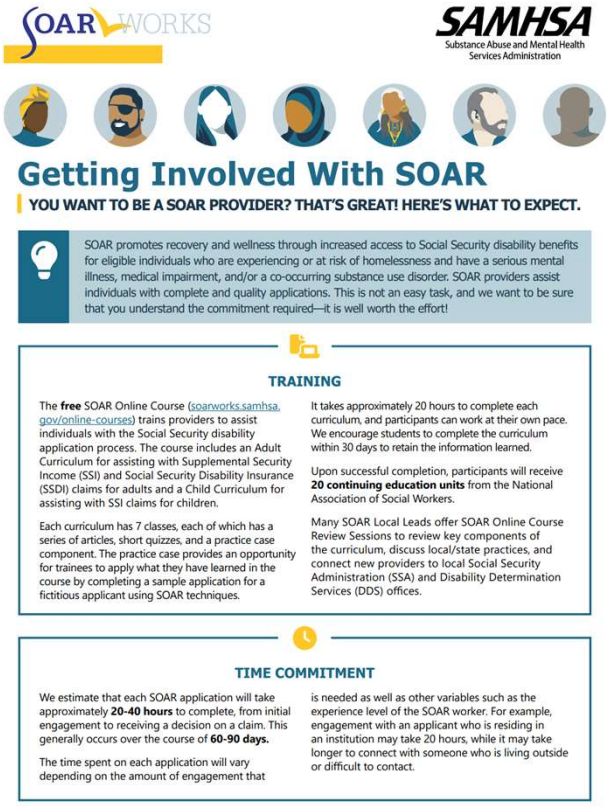
Getting Involved: Time Commitment

- Training: 20 hours
- 20-40 hours per complete application
- SOAR Critical Components
- Outcome Tracking
- Benefit to Your Agency and the Individuals You Serve



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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—it is well worth the effort!

TRAINING

The **free** SOAR Online Course (soarworks.samhsa.gov/online-courses) 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.

Each curriculum has 7 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 for a fictitious applicant using SOAR techniques.

It takes approximately 20 hours to complete each curriculum, and participants can work at their own pace. We encourage students to complete the curriculum within 30 days to retain the information learned.

Upon successful completion, participants will receive **20 continuing education units** from the National Association of Social Workers.

Many SOAR Local Leads offer 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 Disability Determination Services (DDS) 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.

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Online Application Tracking (OAT)

OAT WORKS
Online Application Tracking

All the reasons
OAT is awesome!

- Web based
- User friendly
- HIPAA compliant
- Monitors quality
- Takes only 3-5 minutes
- It's FREE!

https://soartrack.samhsa.gov

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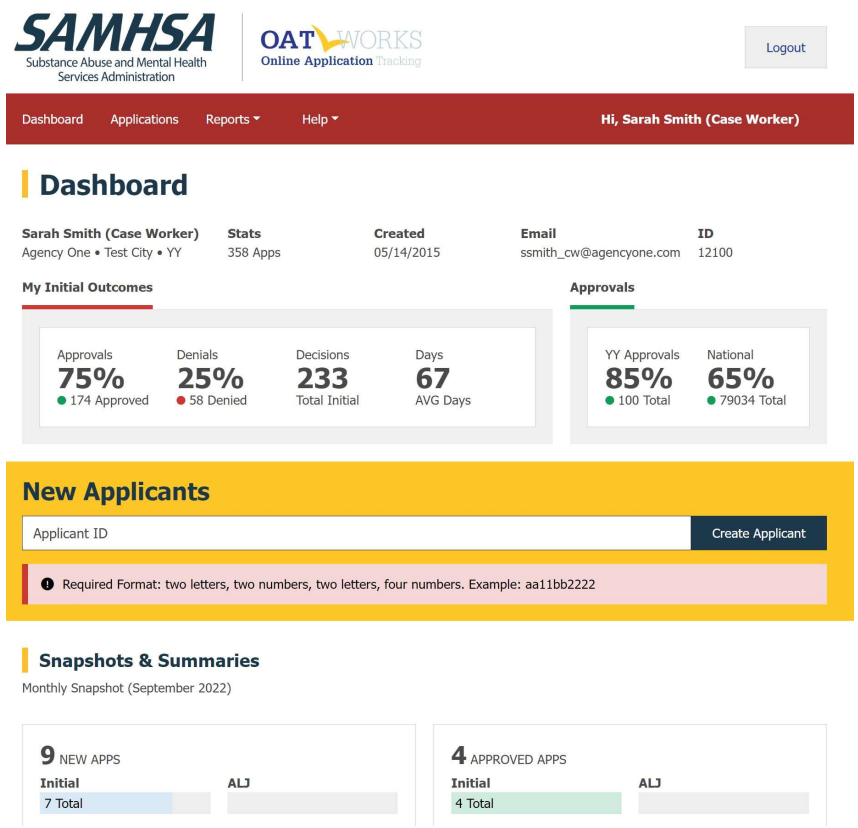
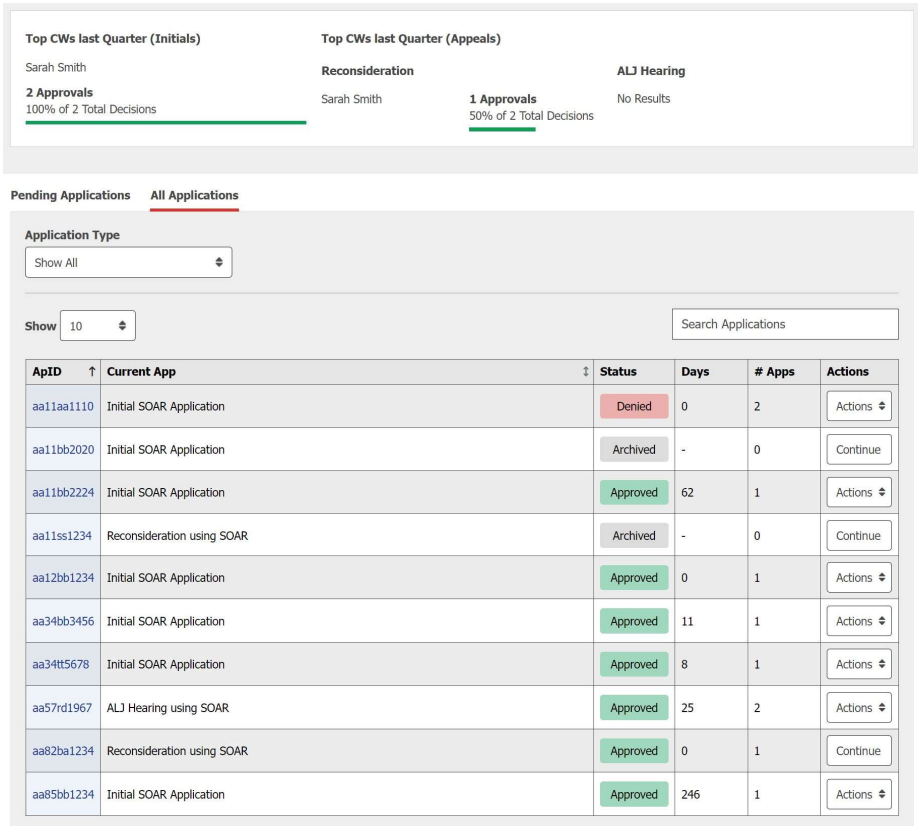
OAT Case Worker Dashboard





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SOAR in Pennsylvania

Become involved in the statewide initiative!

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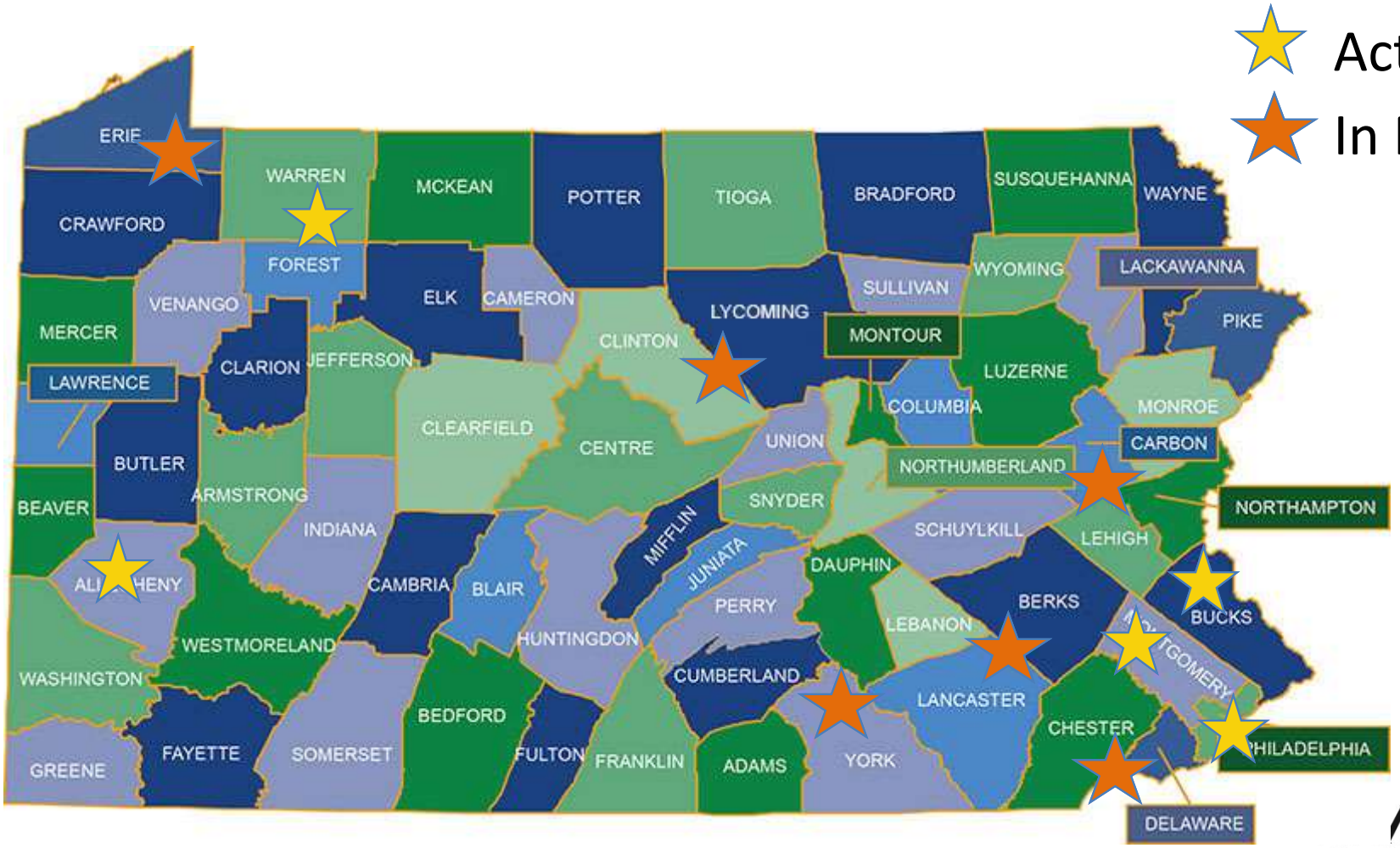
SOAR in Pennsylvania



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SOAR in Pennsylvania

- Top 10 states!
- 2023 Outcomes
  - 83% approval rate on initial application
  - 105 average days to decisions
- Cumulative Outcomes
  - 90% approval rate on initial application
- SOARWorks in PA, but more is needed!

Lets Discuss

Questions, curiosities, and next steps

Questions to Consider/Next Steps

- Do you work with people that need to apply for SSI/SSDI?
  - If so, how do you support them?
  - Is it working? What are the outcomes?
- Are you already supporting aspects of the SOAR application (engagement, medical records collection, etc.)
- Who should become trained, and how will their time be allocated?
- Next Steps
  - Learn more about SOAR
  - Reach out to your SAMHSA SOAR TA Center Liaison and SOAR State Team Lead
  - Register for the SOAR Online Course

Connect With Us

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