

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.

June 2024



SAMHSA
Substance Abuse and Mental Health
Services Administration

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?



- 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

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

SSI/SSDI Eligibility: Definition of Disability for Adults

SSA's Definition of Disability



Medical
Condition(s)

- Diagnosis
- Documentation
- Duration

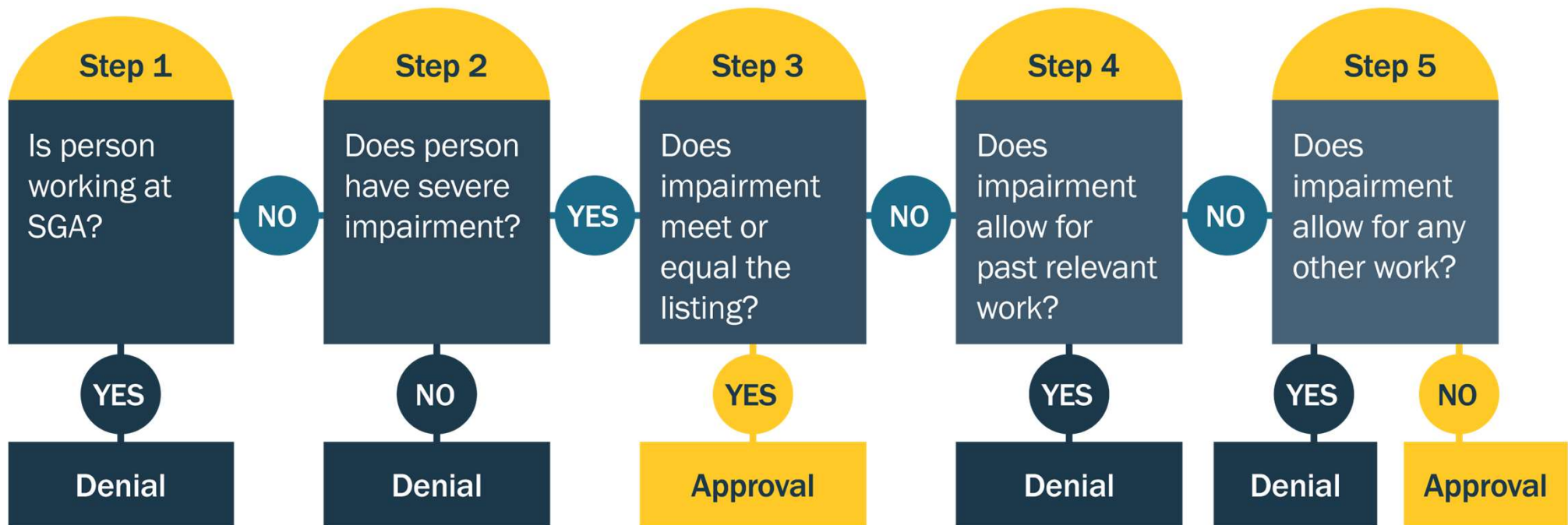


Functional
Impairment(s)

- Severity
- Work
- SGA

Sequential Evaluation

The SSA Sequential Evaluation for Adults



SOAR is for Everyone

SOAR WORKS | SOAR IS FOR EVERYONE

SSI/SSDI Outreach, Access, and Recovery (SOAR) is a national program funded by the [Substance Abuse and Mental Health Services Administration \(SAMHSA\)](#). SOAR increases access to the disability income benefit programs administered by the [Social Security Administration \(SSA\)](#) for eligible adults and children who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder.

 <p>LIFESPAN</p>	 <p>DIVERSE POPULATIONS</p>	 <p>SYSTEMS</p>
<p>CHILDREN</p> <ul style="list-style-type: none">  SOAR Online Course: Child Curriculum  SSI for Children: Information Sheets  SOAR for Children Process Intercepts Infographic <p>YOUTH</p> <ul style="list-style-type: none">  Myth-busting: SSI/SSDI and Transition Age Youth  Connecting Unaccompanied Youth Experiencing Homelessness to Social Security Disability Benefits <p>ADULTS</p> <ul style="list-style-type: none">  SOAR Online Course: Adult Curriculum <p>OLDER ADULTS</p> <ul style="list-style-type: none">  Webinar: Strategies and Considerations for Representing Older Adults with SSI/SSDI Claims 	<p>LGBTQ+</p> <ul style="list-style-type: none">  FAQs for Assisting LGBTQ+ Individuals with SSI/SSDI Applications <p>NATIVE COMMUNITIES</p> <ul style="list-style-type: none">  A Toolkit for Engaging with Native Communities  SSI/SSDI Eligibility for American Indians and Alaska Natives <p>VETERANS</p> <ul style="list-style-type: none">  SSA and VA Disability Benefits: Tips for Veterans  SSVF and SOAR Integration Toolkit 	<p>EDUCATION</p> <ul style="list-style-type: none">  Integrating SOAR into Social Work Education <p>EMPLOYMENT</p> <ul style="list-style-type: none">  SOAR Provides a Pathway to Employment <p>FOSTER CARE</p> <ul style="list-style-type: none">  Child SSI: Spotlight on Applicants in Foster Care <p>LEGAL SYSTEM</p> <ul style="list-style-type: none">  SOAR Works for Individuals Involved in the Legal System  SSI/SSDI in Legal Settings: FAQs
<p>For more information: soar@prainc.com (518) 439-7415 ext. 2 soarworks.samhsa.gov</p>		

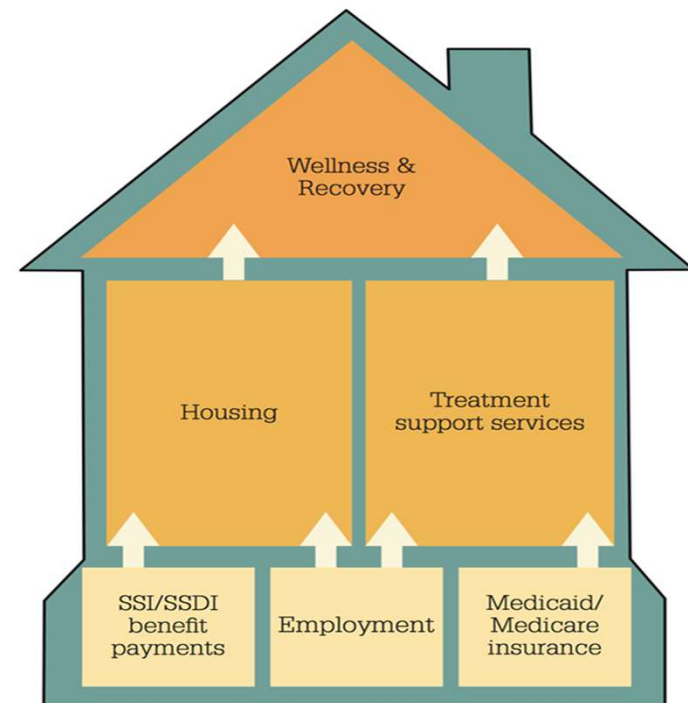
SOAR Works across the lifespan, with diverse populations, and within complex systems.

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



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**).

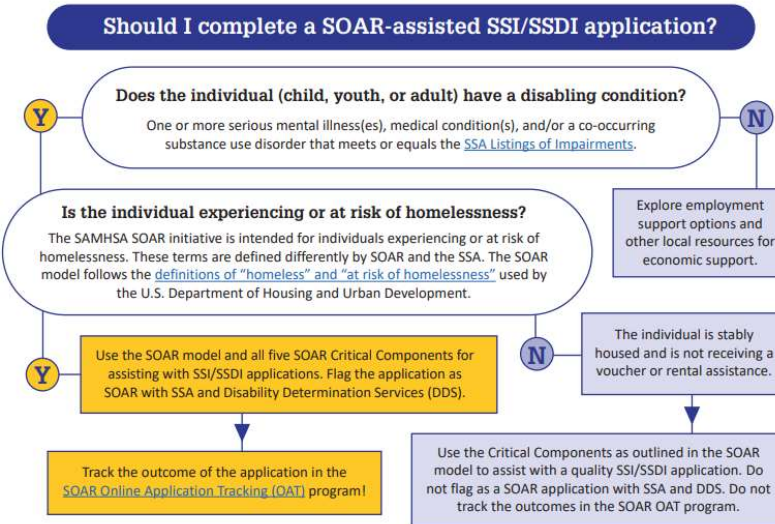
* <https://soarworks.samhsa.gov/about-the-model/oat-and-outcomes>

Who is a SOAR Applicant?

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

SOAR WORKS SOAR Eligibility: Decision Tree

SSI/SSDI Outreach, Access, and Recovery (SOAR) is funded by the [Substance Abuse and Mental Health Services Administration \(SAMHSA\)](#) and is a national program designed to increase access to the disability income benefit programs administered by the [Social Security Administration \(SSA\)](#) for eligible adults and children who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder.



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	<ul style="list-style-type: none"> Are there racial, ethnic, or cultural reasons why a potential applicant may not consider themselves 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	<ul style="list-style-type: none"> 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? 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	<ul style="list-style-type: none"> 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)?

What Makes SOAR Unique?



SOAR-trained case workers are the heroes!



SOAR Works!

2023 Outcomes

INITIAL APPLICATIONS APPEALS

APPROVAL RATE

66% 42%

NUMBER OF APPROVALS

2,604 324

NUMBER OF DECISIONS

3,918 763

AVERAGE DAYS TO DECISION

167 196

Cumulative Outcomes

65%

CUMULATIVE INITIAL APPROVAL RATE

50%

CUMULATIVE APPEAL APPROVAL RATE

56,481

CUMULATIVE INITIAL APPROVALS

8,891

CUMULATIVE APPEAL APPROVALS

65,372
PEOPLE RECEIVING
BENEFITS BECAUSE
OF SOAR



105,013
TOTAL SERVED

*National SOAR outcomes as of June 30, 2023

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

2023 Financial Outcomes

Financial Outcomes

\$5,570



Average Medicaid reimbursement per beneficiary

\$3,660



Average general assistance reimbursement

\$7,017

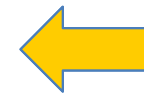
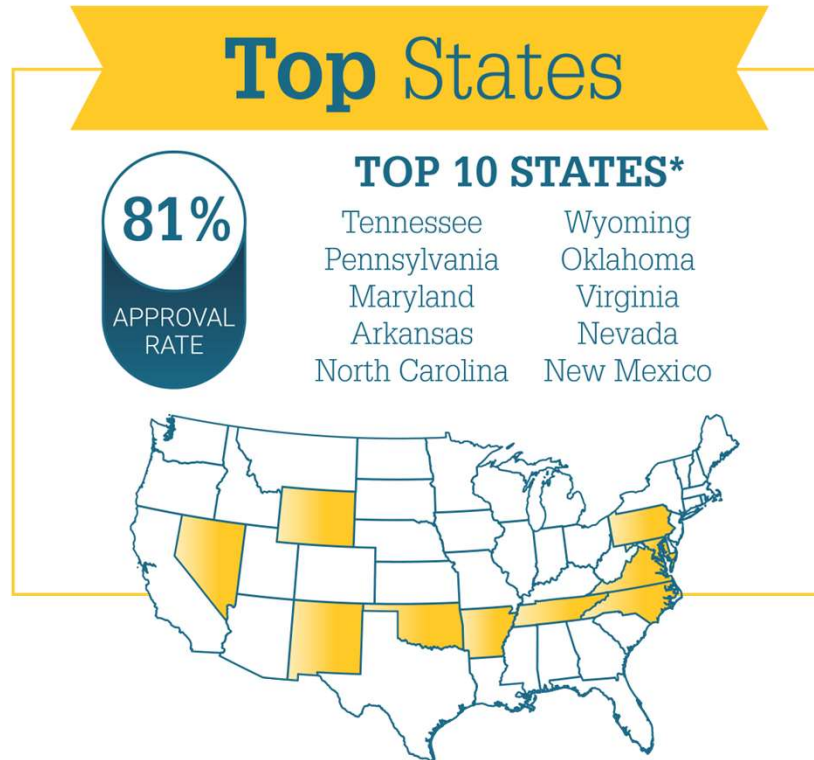
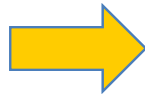


Average retroactive back payment

\$717M

Brought into the economies of participating localities

SOAR Super Stars!



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.

15 Combined, these states had 22,245 decisions

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

Oh, the support you will receive!

SOAR TA Center Activities and Support



SOAR Online Course



SOAR Leadership Academy



SOAR Online Application Tracking (OAT) Program



SOARWorks Library



Individual Technical Assistance



SOARing Over Lunch



SOAR eNews



Bi-Monthly Webinars

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)



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).

[Learn More](#)

The image shows a grid of 10 diverse adult faces, representing the target population for the Adult Curriculum course.



SOAR Online Course: Child Curriculum

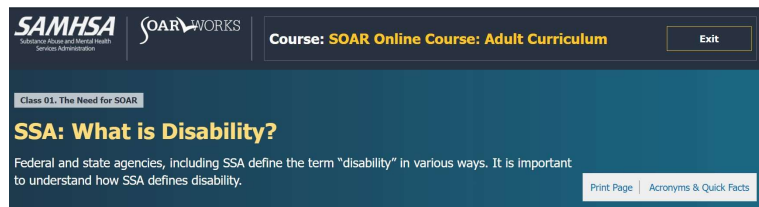
This course trains case workers to assist children (under age 18) who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for Supplemental Security Income (SSI), a Social Security Administration (SSA)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

[Learn More](#)

The image shows a grid of 10 diverse children's faces, representing the target population for the Child Curriculum course.

SOAR Online Course: Articles and Practice Case

Articles and Content



Pages in this Course:

- Course Introduction
- 01. The Need for SOAR
- 01. What is SOAR?
- 02. Overview of Social Security Disability Programs: SSI and SSDI
- 03. SSA: What is Disability?
- 04. Access to SSA Disability Programs: Players, Roles & Tasks
- 05. Steps in the SSA Disability Application Process
- 06. Disability Determination: The SSA Sequential Evaluation
- 07. The SOAR Model: Critical Components
- 08. The SOAR Process: Critical Components in Action
- 09. Definitions of Homelessness
- 10. Identifying SOAR Applicants
- 11. SOAR Values
- 12. Try It: Key Concepts of Class 1
- 13. Class 1 Conclusion
- 14. Meet Your Client - Practice Case
- 02. Initiating the Application
- 03. Exploring Basic Eligibility
- 04. Medical Information
- 05. The Link to Functioning
- 06. Completing the Application Packet

Disability and Work

The Social Security Administration (SSA) recognizes that a person can have a serious illness or condition yet still be able to work. For example, many people with serious mental illnesses in recovery are able to work. Many enjoy the benefits of work, including:

- An income that goes beyond meeting the most basic needs
- A sense of accomplishment and identity
- The satisfaction of being productive members of their communities

SOAR helps people to access SSI/SSDI in the hope they will eventually be able to enjoy these benefits.

SSA's Definition of Disability

The Social Security Administration (SSA) defines disability as:

- The inability to engage in *substantial gainful activity (SGA)*
- Because of *medically determinable physical or mental impairment(s)*
- That has lasted or is expected to last for a continuous period of *at least 12 months* OR is expected to *result in death*

Substantial gainful activity (SGA)

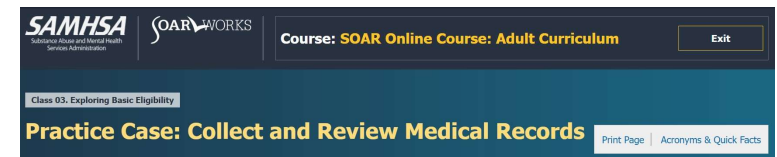
- SSA term with specific criteria and calculations
- Activities that are productive (mental or physical)
- "Gainful" – work activity for pay or profit, even if profit is not realized
- Earnings of [\\$1,350/month in 2022](#)
- SSA and DDS need to know: Can the person work at levels of SGA?

Medically determinable

- Physical or mental health conditions
- Must be documented with clear evidence by an acceptable medical source as defined by SSA

Impaired functioning

Practice Case



Pages in this Course:

- Course Introduction
- 01. The Need for SOAR
- 02. Initiating the Application
- 03. Exploring Basic Eligibility
- 01. Exploring Basic Eligibility: "Non-Medical" Information
- 02. SSA and VA Disability Benefits: Tips for Veterans
- 03. SSA-16: Application for Social Security Disability Insurance (SSDI)
- 04. Information Requested on the Online Disability Benefit Application
- 05. SSA-8000: Application for Supplemental Security Income (SSI)
- 06. SSA-8000: Living Arrangements
- 07. Try It: Living Arrangements
- 08. SSA-8000, Parts 1 & 2: Basic Eligibility and Living Arrangements
- 09. SSA-8000, Parts 3 & 4: Income and Resources
- 10. SSA-8000, Parts 5, 6, 7 & 8
- 11. Class 3 Conclusion
- 12. Collect and Review Medical Records - Practice Case
- 04. Medical Information
- 05. The Link to Functioning
- 06. Completing the Application Packet
- 07. Supporting Resiliency and Recovery
- Course Completion

Welcome to the SOAR Online Course Practice Case!

Tasks for this Class:

1. Learn about your applicant

- View the interview video.
- Read the progress notes and medical records.

2. Begin to fill out forms SSA-8000 and SSA-16

- Open the blank forms you saved to your computer on the Class 1 Practice Case page, *Meet Your Client*.
- Begin to fill in the forms electronically and **save your changes**.
 - You will upload these completed forms on the Class 4 Practice Case page.

3. Begin writing the Medical Summary Report (MSR)

- Use the MSR Template provided on the Class 1 Practice Case page, *Meet Your Client*.
- Use the information you have learned about your applicant to begin writing the *Personal History* Section.
 - You will upload the completed MSR on the Class 6 Practice Case page.

Need help? Read our [troubleshooting tips](#) or [watch this video](#) about saving/completing forms. You can also email us at soaronline@raininc.com.




Step 1: Watch the Video

Watch the Interview Video and take notes on what you observe. Come back to this page at any time to view the video again.




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



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.

Online Application Tracking (OAT)



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>

OAT Case Worker Dashboard



Logout

Dashboard Applications Reports Help **Hi, Sarah Smith (Case Worker)**

Dashboard

Sarah Smith (Case Worker) | **Stats** 358 Apps | **Created** 05/14/2015 | **Email** ssmith_cw@agencyone.com | **ID** 12100

My Initial Outcomes

Approvals **75%** (174 Approved)
 Denials **25%** (58 Denied)
 Decisions **233** Total Initial
 Days **67** AVG Days

Approvals

YY Approvals **85%** (100 Total)
 National **65%** (79034 Total)

New Applicants

Applicant ID

Required Format: two letters, two numbers, two letters, four numbers. Example: aa11bb2222

Snapshots & Summaries

Monthly Snapshot (September 2022)

9 NEW APPS

Initial 7 Total | ALJ

4 APPROVED APPS

Initial 4 Total | ALJ

Top CWs last Quarter (Initials)

Sarah Smith
2 Approvals
 100% of 2 Total Decisions

Top CWs last Quarter (Appeals)

Reconsideration
 Sarah Smith
1 Approvals
 50% of 2 Total Decisions

ALJ Hearing
 No Results

Pending Applications **All Applications**

Application Type

Show All

Show 10

Search Applications

ApID	Current App	Status	Days	# Apps	Actions
aa11aa1110	Initial SOAR Application	Denied	0	2	Actions
aa11bb2020	Initial SOAR Application	Archived	-	0	Continue
aa11bb2224	Initial SOAR Application	Approved	62	1	Actions
aa11ss1234	Reconsideration using SOAR	Archived	-	0	Continue
aa12bb1234	Initial SOAR Application	Approved	0	1	Actions
aa34bb3456	Initial SOAR Application	Approved	11	1	Actions
aa34tt5678	Initial SOAR Application	Approved	8	1	Actions
aa57rd1967	ALJ Hearing using SOAR	Approved	25	2	Actions
aa82ba1234	Reconsideration using SOAR	Approved	0	1	Continue
aa85bb1234	Initial SOAR Application	Approved	246	1	Actions

SOAR in Pennsylvania

Become involved in the statewide initiative!

SOAR in Pennsylvania



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

SOAR TA Center

Abby Kirkman

SAMHSA SOAR TA Center

Assistant Director

Pennsylvania SOAR Liaison

akirkman@prainc.com

(518) 439-7415, EXT: 5226

Pennsylvania SOAR State Lead

Lauren MacWithey

PA Department of Human Services

(717) 772-6265

Imacwithey@pa.gov

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