

LDRC SOAR PROGRAM REFERRAL GUIDE & FAQ

1. Is your client homeless/at-risk of homelessness with a mental health/co-occurring disorder or cognitive impairment expected to last at least 12 months *and* prevents them from working full-time due to severe functional impairments?

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 Yes, continue.


 No, SOAR cannot assist.

2. Does your client have a pending claim? Yes or No

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 If yes and it is at the *hearing* level SOAR cannot assist.


 If no, at "reconsideration" appeal, or not sure, continue.

3. Does your client need intensive support to make it through the disability process and cannot reasonably be expected to keep appointments, fill out forms, and perform other multi-step processes independently?

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 If yes, continue.


 If no, please refer client to other supports.

4. Has your client previously applied for SSI/SSDI benefits in the past 3-5 years? Yes/client can't remember* or No

*If yes, or client is not sure, have there been any significant developments in their treatment (new SMI determination, multiple inpatient psychiatric hospitalizations, COT, Rule 11, etc.) since their last filing? Yes No or Has Not Recently Filed

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If yes, contact SOAR Specialist to staff your client and make referral.



If no recent significant developments then SOAR is likely unable to assist. Please contact SOAR Specialist direct to staff your client if you feel they cannot work despite recent denials.



If client has never, or not recently, applied for benefits then contact SOAR Specialist to staff your client and make referral.

MAKING YOUR REFERRAL INTO THE LDRC SOAR PROGRAM

- After reviewing this guide please contact SOAR Specialist to staff your client
- Please do not give your client the Specialist's phone number without staffing
- All referrals are subject to a pre-screen assessment to determine eligibility

For information on SOAR or becoming SOAR trained please visit: www.soarworks.prainc.com.

For questions about this form or the LDRC SOAR program please contact the SOAR Specialist →

Contact Information

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ANSWERS TO FREQUENTLY ASKED QUESTIONS ABOUT THE LDRC SOAR PROGRAM

What definition of homelessness does your SOAR program recognize for program eligibility?

Our SOAR program does not adhere to a specific definition of homelessness. We do not want a definition to be a barrier to assist those who may need the support (i.e. incarceration, residential, permanent supportive housing, or similar living arrangements).

My client is being referred for a pre-screen assessment. What should I tell them to expect during the interview?

The pre-screen assessment is a one-on-one consultation with the specialist to confidentially discuss your client's limitations, treatment history, and other personal information to determine if SOAR can assist in applying for SSI/SSDI benefits. This can take anywhere from 10 minutes to an hour depending on the complexity of the case and level of functioning of the individual. Case managers are encouraged to attend and advocate for their client. It is wise, but not necessary, to bring any available medical records, SSA paperwork, and legal documentation to the interview. If the client has special needs and is unable to come to the LDRC for appointment the SOAR specialist can come to them. The SOAR Specialist will staff your client with you prior to meeting them.

My client has a qualifying mental health diagnosis. Why weren't they accepted into the SOAR program?

Since every individual's situation is unique it is impossible to provide basic eligibility criteria. Disability determinations can be highly technical as is the pre-screen assessment. *Evidence or presentation of the severity of functional limitations are actually more important than a formal diagnosis or even an SMI determination.* Age, education, past work history, and other areas are considered as well. It is important to understand that clients are only assessed to determine if they need an intensive level of support to apply for SSI/SSDI. Being turned down for SOAR does not mean the client should not still apply for SSI/SSDI if they feel they cannot work. The SOAR specialist may encourage the referring agency to support the client or advise them to seek legal representation.

My client has a pending claim, but I think they really need some help. Can I refer them to you?

Absolutely! We have multiple success stories of jumping into existing claims that would have been denied had it not been for your referral. Clients do not always remember their treatment providers or understand their own illness/limitations. SOAR aims to fill in those missing pieces for the SSA/DDS. With a well-timed referral your client can avoid costly lawyers and years waiting for a hearing.

Do you help with appeals? My client keeps getting denied, had benefits before, or is in a continuing disability review.

Yes and no. There are several reasons for denial, especially with the homeless population. Subject to a pre-screen we can assist with the following situations: denials at the initial level, clients coming out of jail or prisons that were previously on benefits, and clients who lost benefits and are appealing their continuing disability review (CDR). Our SOAR program does not assist with pending or recently-decided ALJ hearings. Legal representation is strongly recommended for clients with pending hearings.

Special situations such as terminally ill clients, those over 65, under 18, immigration status, and survivor benefits

If you have verified your client is terminally ill, please contact the SOAR Specialist immediately. If your client is over 65 years old, go ahead and apply them for SSI/SSDI. They should automatically be approved based on age. The LDRC SOAR program currently does not assist individuals under the age of 18, those with immigration issues legally preventing them from applying, or survivor benefits.

What exactly is SOAR or how do I explain it to an agency or co-worker interested in the program?

SOAR is a national best practice developed to assist homeless adults with mental illness/co-occurring disorders apply for SSI/SSDI. SOAR aims to submit quality applications to promote recovery and improve quality of life. SOAR programs are community-based and vary from agency to agency. All 50 states have a SOAR program. The LDRC SOAR program provides intensive case management support to connect individuals to income, coordinate housing, and establish care. The SOAR Specialist does not replace existing case managers and is not a payee, but acts as a legal representative to assist with gathering and analyzing medical evidence to advocate to the SSA/DDS. SOAR is 100% free to clients *even upon approval of benefits.* The SOAR Specialist is also available to present on SOAR to your agency by request. You, too, can become trained in SOAR or refer your clients into our program!