

Issue Brief

Integrating SSI/SSDI Outreach, Access, and Recovery (SOAR) into Social Work Education

ENHANCING UNIVERSITY-COMMUNITY
SOAR PARTNERSHIPS

PUBLICATION INFORMATION

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OVERVIEW

About SOAR

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

SOAR Training

The SAMHSA SOAR Technical Assistance (TA) Center offers two Online Courses that train case workers to assist individuals in applying for SSI/SSDI (SSA's disability income benefit programs). The courses provide comprehensive information about SSI/SSDI and the disability determination process, including the SOAR Critical Components of completing and submitting applications.

SOAR Leadership

State and Local Leads spearhead and coordinate the implementation of SOAR initiatives. These leaders identify and engage stakeholders to participate in steering committees whose goal is to create and implement a SOAR action plan and process for SSI/SSDI application submission. These committees meet regularly to collaborate, report on progress, and troubleshoot challenges.

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As many communities continue to expand implementation of SOAR, collaborations with community stakeholders are of the utmost importance in addressing key barriers. Despite the numerous benefits of Supplemental Security Income (SSI)/ Social Security Disability Insurance (SSDI) to individuals and communities, many agencies report a lack of capacity to meet their community's need for SOAR assistance.

University Schools of Social Work can potentially play a critical role in helping communities to address this challenge by integrating SOAR training or SOAR work into existing social work education.

This document is designed to provide guidance on how community agencies and local colleges/universities can collaborate to develop partnerships that integrate SOAR within the social work learning process.

ABOUT SOAR

SSI/SSDI Outreach, Access, and Recovery (SOAR) is a national program funded by the Substance Abuse and Mental Health Services Administration (SAMHSA) that aims to increase access to Social Security Disability programs (Supplemental Security Income [SSI] and Social Security Disability Insurance [SSDI]) 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.

The SOAR model has been shown to expedite the application process and produce higher approval rates compared to non-SOAR assisted SSI and SSDI applications. The SOAR model has been used to assist over 95,166 people who were experiencing homelessness over the past 15 years. Of the initial applications (78,934) assisted using SOAR, 65 percent, representing 50,957 persons, have been approved for SSI/SSDI since SOAR began.

An additional 8,196 persons, whose applications were denied initially, were

approved on reconsideration or at an Administrative Law Judge (ALJ) Hearing.

Taken together, since 2006, the SOAR approach is responsible for obtaining Social Security disability income benefits for 59,153 people who were experiencing or at risk of homelessness.

SOAR Training

SOAR training for case workers is offered in a self-paced online course format and provides comprehensive information on the disability determination process and the SOAR critical components of completing SSI/SSDI applications. The SOAR Online Course is available as an [Adult Curriculum](#) focused on SSI/SSDI applications for adults or a [Child Curriculum](#) focused on SSI applications for children. Each course provides an opportunity for trainees to put their learning into practice by completing an SSI/SSDI application packet for a fictional applicant. Successful completion of the course comes with 20 free Continuing Education Units from the National Association of Social Workers.



Since 2006, the SOAR approach is responsible for obtaining Social Security disability income benefits for 59,153 people who were experiencing or at risk of homelessness.



Integrating SOAR into social work curricula addresses limited capacity to meet the overwhelming need for SOAR assistance.

COMMUNITY-UNIVERSITY COLLABORATIONS

Successful partnerships between community agencies and University Schools of Social Work can result in marked benefits to both parties. Field placement interns increase staff capacity and strengthen the ability of nonprofit organizations to serve their community. For universities, these relationships allow Schools of Social Work to provide additional field placement options for their students.

Addressing Homelessness

Recognizing the increasing need to build and strengthen relationships with homelessness services agencies, the National Homelessness

Social Work Initiative was developed through a collaboration between the Council on Social Work Education and the National Center on Excellence in Homeless Services in 2015. This initiative emphasizes increasing homelessness curricular content in social work education, expanding field placements, advancing data-driven policies and services, and creating leadership paths for social work students in the field of homelessness.

The integration of SOAR into social work education and fieldwork directly aligns with the Council's mission to teach students current best practices for ending homelessness and provide opportunities for them to engage in professional tasks that address real world problems in their communities.

INTEGRATING SOAR

Communities implementing SOAR can benefit greatly from collaborating with university social work programs to expand local capacity in addressing homelessness. Social work programs have existing relationships with homeless service agencies for field placements, and have the opportunity to provide innovative

course work that imparts current and emerging tools being used and developed for homeless service settings.

SOAR programs cite lack of capacity as a barrier to meeting the overwhelming need for SOAR assistance among individuals

experiencing or at risk of homelessness. This is primarily due to a lack of dedicated funding for SOAR case workers, but also because many who are working in the community have not acquired the skills to assist with SSI/SSDI applications. Integrating SOAR into social work curricula addresses these barriers.

Benefit to Students

The benefit of SOAR training and fieldwork experience extends to students as well. SOAR training certification is recognized in all 50 states and Washington, DC, thereby enhancing a student's resume and skillset upon entering the workforce. The practical application of SOAR work at a field placement gives the student an opportunity to serve as an agent of change, helping real clients from community agencies. Inherent in the process of assembling a complete and thorough SSI/SSDI application are skills such as client engagement, active listening, trauma-informed interviewing, and clinical writing. Due to the collaborative

Acquired Skills While Implementing SOAR

- Client engagement
- Active listening
- Trauma-informed interviewing
- Clinical writing
- Available local, state, and federal resources to ending homelessness

nature of the SOAR process, students are likely to become familiarized with the resources available to clients and the various institutions/systems assisting with the community's effort to end homelessness.

Equipping social work students at the beginning of their careers with the knowledge and skills to address the individual and systemic barriers to accessing benefits will make a significant impact on ending homelessness.

INITIATING CONVERSATIONS: UNIVERSITY-COMMUNITY COLLABORATION READINESS

Know Your Ask and Your Audience

Given the diversity of SOAR initiatives around the country, it is important to "know your ask" when initiating conversations about integrating

SOAR into social work education programs. It is also important to be selective and targeted about who you ask. It is more effective to focus on a small number of entities who are well-equipped to answer your query rather than a large number who are not in the necessary decision-making positions.

Be Clear and Prepared

- Be clear about what you will need the university/agency to do to fulfill the request.
- Outline how much time, energy, money, or commitment you think it will take. Share the [Getting Involved in SOAR](#) resource.
- Put the ask up front and reiterate it at the close of the meeting. This could be in the form of an action statement/item, (e.g., scheduling a follow-up call or meeting, asking to create a Memorandum of Understanding [MOU], obtaining contact information for another key stakeholder).

Community Agency Representative Assessment

- What roles can social work students or interns play within your local/state SOAR initiative?
- What problem are you looking to address, (e.g., lack of staff capacity to complete SOAR applications, underutilization of SOAR in your community/state, underdevelopment of internship opportunities in your community/state, need for data tracking)?
- How can University Schools of Social Work directly help you address that problem?
- Are there local schools in your community that offer the type of program and training your agency is seeking?

Table 1. Key Action Steps for Community Agencies

| The Ask | Key Action Steps |
|--|---|
| <p>I would like to have social work students placed at my agency to complete or support existing staff in completing SOAR-assisted SSI/SSDI applications as part of their field work.</p> | <ul style="list-style-type: none"> • Review school-specific requirements for the social work curriculum. Identify programs or tracks that are related to mental health, homelessness, or disability. • Contact the Social Work Department Chair to discuss options for customizing coursework. • Contact the field placement director about establishing designated SOAR internship options. • Create or identify an existing intern/fieldwork position that can commit or re-allocate job duties for SOAR work. • Review the Hiring and Supervising SOAR Case Workers Toolkit, which provides helpful suggestions and key considerations when developing positions for and supervising SOAR case workers. • Contact the State Team Lead or Local Lead to hold a SOAR Orientation presentation and discuss how SOAR work benefits students, the community, and the University. • Provide outreach materials to field work students. • When in place, have social work students complete the SOAR Online Course. |

School of Social Work Representative Assessment

- What is the level of interest among social work students in working with people experiencing homelessness or people with disabilities?
- What are the options for incorporating SOAR work into your social work education program? Are there existing classes where SOAR training can be incorporated (e.g., special topics classes, advanced electives, practicums)?
- Who are the key stakeholders in your community that may be able to assist/provide input into the design and development of these partnerships?
 - Is there a state director for homeless programs?
 - Is there an academic colleague with expertise in homeless service programs?
 - Are there program alumni already established and working in the field?
- What type of infrastructure for SOAR already exists in the community?
 - Is there a SOAR Local Lead assisting with initiative efforts?
 - What community collaborations currently exist?
- What are the potential gaps that social work students can assist with?
- What agencies in the community are already involved with SOAR?
 - What populations do they serve?
 - Are there potential placement options that explore intersectionality (e.g., the intersection of homelessness and the judicial system, health care system)?

Table 2. Key Action Steps for Universities

| The Ask | Key Action Steps |
|---|--|
| <p>I would like social work students to take the SOAR Online Course as part of their social work curriculum (special topics coursework, practicum course, etc.).</p> | <ul style="list-style-type: none"> • Contact the State Team Lead or Local Lead to set up a SOAR Orientation presentation and discuss how SOAR work benefits students, the community, and the University. • Review the existing social work curriculum to identify opportunities where SOAR work can be incorporated. • Identify key community stakeholders who may be able to provide input on the design and development of the curriculum. |
| <p>I would like to partner with community agencies to offer SOAR focused fieldwork placements.</p> | <ul style="list-style-type: none"> • Contact the State Team Lead or Local Lead to set up a SOAR Orientation presentation and discuss how SOAR work benefits students, the community, and the University. • Review local/state plans for ending homelessness to identify existing gaps. • Collaborate with SOAR leads and/or key collaborators to identify existing opportunities for placements or evaluate/identify need to create new placements. • Hold regular meetings with SOAR leaders and key community collaborators. |

COLLABORATION OPTIONS/ EXAMPLES

When discussing the integration of SOAR work into social work education, it is important to establish a clear plan to achieve your desired outcomes. Here are some examples of how various aspects of the SOAR training have been successfully incorporated into social work courses and field placements.

Advanced Practice Electives/Special Topic Classes

Courses designated for special topics or advanced practice electives address topics that consider specific populations, complex problem situations, or particular social work roles and functions relevant to advanced generalist practice.

California State University, Long Beach

has been offering an advanced practice elective, "Homelessness Prevention and Intervention in Social Work practice," each Fall semester since 2015. An alumnus of the school, who is the associate director of systems integration at the Los Angeles Homeless Services Authority, in consultation with the director of the school, designed the course to include the SOAR certification process as the major assignment. The instructor introduces the SOAR certification process via the SAMHSA SOAR TA Center website during the first two



weeks of class and then gives case examples to build the student's experience and knowledge in homeless prevention and intervention services. The students are allotted time during class each week to work on the SOAR Online Course, but the majority of the training is expected to be completed outside of class over the entire semester. Proof of completion and certification is required to earn full credit for the course.

SOAR-Focused Field Placements

The **State University of New York at Albany**

developed a two-pronged strategy for integrating SOAR within its school of social work: a meeting with the state director for homelessness programs followed by the subsequent location of a field placement for students supervised by a SOAR-trained staff person. After receiving support from the state director for homelessness programs to pursue a university-community partnership, a student was selected the following semester and was placed in a homeless services program serving families. The student completed the 20-hour SOAR Online Course during their field placement hours and began completing SOAR-assisted applications at the agency once certification was received.



The design of this particular partnership is unique in that field placement was the key learning modality as opposed to classroom preparation. In this case, school administrators embedded the SOAR learning into a field placement with a SOAR-trained supervisor. This partnership model offers the benefit of expediency. Allowing the student to complete the course as part of their internship avoids the lengthy process of adding additional training (i.e., SOAR Online Course) to the social work curriculum. However, such a model also assumes there are numerous SOAR-trained field supervisors ready and available. Communities will want to evaluate their capacity in this regard if interested in this type of university-community partnership.

SOAR Coursework/Field Placement Combinations

The **Catholic University of America** began exploring the possibility of a local university-community SOAR initiative in 2016 by initiating a meeting with the Washington, DC, SOAR leadership team and provider community. The provider community decided to partner with the University's School of Social Work to address local capacity. To do this, they decided on a pilot project consisting of three students to be placed in agencies with Master's of Social Work (MSW)-level supervisors who were certified in the SOAR model. Tasks included using SOAR in the benefits application process and also participating in generating ideas to address structural design issues and engage in systems-level advocacy as needed.



Group supervision is provided once per month by a member of the SOAR Leadership team to process the students' experiences. In order to properly prepare students for this field placement, the faculty liaison developed a three-credit course on homelessness, which included the SOAR Online Course. In requiring completion of SOAR training, students would be able to enter their field placements SOAR certified and could begin SOAR-related tasks almost immediately.

SOAR Work and Intersectionality with Criminal Justice

SOAR has been successfully integrated into the curriculum of social work interns at the **University of Montana School of Social Work.**

Bachelor's of Social Work and MSW students preparing for a field placement in Missoula County's Jail Diversion Program take the SOAR Online Course. They then complete SOAR-assisted SSI/SSDI applications as part of their placement in a program at the jail that provides mental health and case management services to individuals who are incarcerated and are experiencing serious mental illness. Once approved for Social Security disability benefits, the benefits help to stabilize individuals in the community through housing and other necessary services. Through SOAR implementation, recidivism has dropped and applicants with serious mental illness are able to be served in their community.



RECOMMENDED RESOURCES

SOAR Implementation Resources

- [SAMHSA SOAR TA Center](#)
 - The SAMHSA SOAR TA Center provides training and technical assistance to help states and communities develop implementation plans for SOAR and track outcomes. Each state has a designated TA Center liaison who can provide further guidance on social work partnerships in your state and can assist in the preparation of meetings with schools of social work.
- [SOAR Overview](#)
 - This document provides an overview of the SOAR model, strategies for implementation, and a review of annual outcomes. The overview can be provided to potential stakeholders (such as schools of social work) for educational and strategic planning purposes.
- [SOAR National Outcomes](#)
 - This page provides infographics on annual and cumulative outcomes for SOAR-assisted applications. The data collected from states and communities that implement the SOAR model provide evidence that SOAR Works!

- [Steps to Completing SSI/SSDI Applications Using the SOAR Model](#)
 - This is a step-by-step guide of how to complete and submit an SSI/SSDI application using the SOAR model.
- [Hiring and Supervising SOAR Case Workers: A Toolkit for Workers and Leads](#)
 - This toolkit provides helpful suggestions and key considerations when hiring and supervising SOAR case workers. Tools include helpful considerations for posting positions, the interview process, and unique ways to evaluate a candidate's key competencies.

Social Work Education Resources

- [Social Work Values & Code of Ethics](#)
 - This resource provides information on social work values. This information can be helpful when aligning the value of SOAR work with the values of social work.
- [The Council on Social Work Education \(CSWE\) Required Coursework](#)
 - This resource provides information about required coursework for accredited social work programs both at the Bachelor's and Master's levels.



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