

## Reducing Implicit Bias and DEI Considerations for Identifying SOAR Applicants

The SAMHSA 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"> <li>▪ 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?</li> <li>▪ 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?</li> <li>▪ Are there engagement and communication strategies that you can employ when working to identify a potential SOAR applicant that keep these considerations in mind?</li> </ul>
SOAR Recommends: Characteristics that may Strengthen an SSI/SSDI Application	<ul style="list-style-type: none"> <li>▪ Are there racial, ethnic, or cultural reasons why a potential applicant might not be taking psychiatric medications?</li> <li>▪ 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?</li> <li>▪ 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?</li> <li>▪ 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?</li> <li>▪ 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)?</li> </ul>

## Identifying SOAR Applicants: Adults

This tool is intended to help case workers identify adults who are experiencing or at risk of homelessness who may be eligible for Social Security Administration (SSA) disability benefits. While we do not want to discourage anyone from applying for SSA benefits, this tool should help you identify individuals that most need your assistance with their SSI/SSDI application.

SSA defines adults as persons 18 years of age or older as well as individuals who are within one month (180 days for youth who are aging out of the foster care system) of their 18<sup>th</sup> birthday. Individuals aged 65 or over with low income and resources may be eligible for SSI based on age or eligible for retirement benefits based on their work history, (individuals aged 62-67, depending on year of birth, may be eligible for early retirement benefits).

**Key Eligibility Criteria:** *The following 4 characteristics represent key eligibility criteria for SSA disability benefits*

- Applicant has a serious mental illness or exhibits symptoms and/or has serious physical illnesses that affects their ability to work at a substantial gainful level (\$1,470/month in 2023)
- Illness(es) or condition(s) have lasted or are expected to last for at least 12 months (or result in death)
- Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevent sustainable employment. For example:
  - Psychotic Symptoms (hallucinations, delusions, disorganized thinking/speech/behavior)
  - Depressive Symptoms (decreased energy, lack of motivation, suicide attempts)
  - Manic Symptoms (racing thoughts, disorganized thoughts)
  - Anxious feelings (paranoia, nervousness)
  - Cognitive deficits (brain injury, problems with concentration, memory, etc.)
  - History of trauma (history of abuse, posttraumatic stress disorder, etc.)
  - Other: \_\_\_\_\_
- For applicants with mental illness, they have marked restrictions in at least 2 of these functional areas, or extreme limitations in one area:
  - Understand, remember, or apply information (memory, follow instructions, solve problems, etc.)
  - Interact with others (getting along with others, anger, avoidance, etc.)
  - Concentrate, persist, or maintain pace (as they relate to the ability to complete tasks)
  - Adapt or manage oneself (hygiene, responding to change, setting realistic goals, etc.)

**SOAR Recommends:** *The following characteristics are not essential, but may strengthen an application*

- Applicant is prescribed and takes psychiatric medications and continues to experience symptoms and functional impairments
- Applicant has obtainable medical evidence (for at least part of the past 12 months) that corroborates mental illness and medical conditions. Limited medical evidence or large gaps in treatment is normal and acceptable for successful applications. Assess whether the:
  - Applicant's symptoms are severe enough that a one-time examination by a physician would provide clear medical evidence
  - Representative can write a Medical Summary Report that illustrates a link between the applicant's diagnoses and their symptoms and functional impairments
- Applicant is not working or is working below SGA due to medical and/or psychiatric conditions (i.e., not because they cannot find work or were laid off)
  - History of failed work attempts (started and stopped employment due to diagnosed conditions)
  - Long work history, but can no longer work up to SGA (\$1,470/month in 2023) due to conditions
  - Scattered work history due to conditions and other factors