**About MA SOAR Documents & Resources**

*(The items referenced below can be found under the Documents tab   
on the* [*Massachusetts page of the SOAR Works website*](http://soarworks.prainc.com/states/massachusetts)*)*

The following ADL forms are used in Massachusetts as adjuncts to the standard SSA forms. Massachusetts DDS offices depend upon the submission of ADL forms to adjudicate their cases. In most instances, the DDS examiner cannot refer a case for a review by the in-house DDS medical consultants without an ADL form in file. Ask the examiner to send you a bar code page so that any forms or evidence can be directly scanned into your client’s SSI/SSDI disability file.

* Homeless ADL Form – this form is proprietary to the Massachusetts’ DDS. Please submit the completed form to the examiner assigned to your client’s disability claim. The DDS examiner may also require the SSA-3373, Social Security’s standard ADL form.
* Observational Statement from Outreach/Shelter Worker – this is another form that the Massachusetts’ DDS developed. It is very helpful when a shelter/outreach worker or a case manager completes this form and submits it to the DDS examiner.
* The DAA ADL contains useful supplemental information for those clients with a history of substance abuse. Please complete this form for your client whether they are currently actively using substances or have a recent history of substance abuse. Again, this form is to be submitted to the DDS examiner assigned to your client’s case.
* This Pain ADL is to be completed by clients who have physical pain and should be returned to the DDS examiner assigned to your client’s disability case.
* For those clients who are HIV+ the following ADL form is applicable to them. All HIV information is held in the strictest confidence at the DDS, and your HIV+ client’s case will be assigned to an HIV specialty examiner who works with in-house doctors trained in HIV.
  + SSA-4814 – this form is for medical doctors to complete for their HIV clients who have had an opportunistic infection, or meet the definition of AIDS. Once submitted, your SSI client may be eligible for an early presumptive disability while DDS completes its medical documentation. Note that SSA defines AIDS the same way that the CDC defines AIDS except for two instances: SSA does not consider Kaposi’s Sarcoma on the skin, nor T4 cell counts under 200 as AIDS defining illnesses. Nevertheless, SSA may allow such disability claims if there are significant restrictions in your client’s functioning.
* The SSA-3381 Medical and Job Worksheet may be a useful tool for those busy SOAR case managers who are fielding a number of referrals for SSI/SSDI applications. This form allows the claimant to start gathering their medical, medication, and employment information prior to their first appointment with you.

Even if a homeless individual does not meet the SOAR criteria, you would provide a valuable service by instructing this person where the local Social Security office is located, the least expensive way to get there, and the SSA’s office hours. Ask such individuals to complete the SSA-3381 form to their best ability prior to their going to the local Social Security office. It lets people know what type of questions they will be asked at the SSA office and allows them to gather the information required.

**Other MA SOAR Resources:**

* Flyers for the two Massachusetts organizations that advise SSI/SSDI recipients about opportunities to return to work, and how earned income effects their cash benefits and Medicare/Mass Health Insurance
* *Documenting Disability* by Dr. Jim O’Connell
* *Documenting Disability for Persons with Substance Use Disorders* by Patricia Post
* The MA generated brochure **Social Security Benefits for Homeless People with Disabilities**