PROCESS OF RECEIVING CERTIFICATES OF COMPLETION IN MISSISSIPPI

*The following memo/notice is provided to individuals who request information about the SOAR training and will also be sent to individuals who contact the SOAR State or Local Leads after completing the SOAR online training:*

We are pleased that you are interested in participating in the SOAR *Stepping Stones to Recovery* (SSR) online training. The main goal of SOAR is to obtain expedited approvals for SSI/SSDI applicants who are homeless or at risk of homelessness and who have mental illness and/or co-occurring disorders. We want to be sure that you understand the level of effort that SOAR requires so you feel comfortable committing to this initiative prior to enrolling in and completing the SOAR online training. It is also important to understand that because of the clinical and other support needs of the individuals who have the greatest need for SOAR, implementation of the SOAR model is intended to take place within the scope of a community service provider. Simply accessing SSI/SSDI benefits for an individual who meets the criteria described above is not enough. These individuals also need direct access to an array of services that can address their mental health and housing recovery needs.

The SSR Online training requires a time commitment of approximately 16-20 hours which should be completed within a reasonable timeframe in order to fully retain the content of the training. For individuals to become adept at implementing all of the critical components of SOAR, successful completion of the online training is mandatory. This training is not about the completion of forms. Rather, it is about engagement with individuals who are homeless or at risk for homelessness, understanding the requirements of the Social Security Administration (SSA) for benefits and obtaining needed documentation, serving as appointed representative, obtaining medical records, and writing a detailed medical summary report that captures the individual’s personal, treatment, and functional history so benefits can be expedited.

SOAR considers access to SSI/SSDI as a major tool in recovery, both from mental illness and homelessness. Without these benefits, it is extraordinarily difficult for individuals who are homeless to engage in treatment, to keep appointments, to maintain housing, and to meet other basic needs. Individuals in Mississippi who successfully complete the SOAR online training need to understand that there are additional activities or steps that must be completed in order to be considered a Mississippi certified SOAR Processor. These additional activities will be directed and approved by the MS Department of Mental Health SOAR Specialist. Potential SOAR trainees need to understand what the SOAR model requires and be able to commit to following this process before seeking to become a SOAR Processor in Mississippi.

The SOAR model requires that community staff directly assist applicants. To do this, staff must:

1. • Serve as appointed representative for the purpose of applying for SSI/SSDI. This is NOT the same as being the representative payee. The appointed representative can “stand in” for the applicant, respond to questions, receive copies of all mail sent to the applicant, and communicate back and forth with SSA and DDS, the agency that makes disability determinations. The representative is NOT responsible for the decision so liability is not an issue.
2. • Complete the applications both for SSI and SSDI. These applications consist of several documents: (1) a 23-page application form for SSI; (2) an on-line application form for SSDI; (3) a 12-page on-line disability report along with several releases of information, both agency releases and SSA releases.
3. • Collect medical records from providers who have treated the applicant over the last two years.
4. • Complete a psychosocial assessment, a functional impairment assessment, and a substance use worksheet. The information from these is then incorporated into a comprehensive medical summary report.
5. • Write a medical summary report that includes psychosocial, treatment, and functional information that is co-signed, if at all possible, by a physician or psychologist who has seen the individual. This does not have to be an ongoing treatment provider but it does need to be a physician or psychologist who has met with the individual. The reason for this co-signature is it makes the report “medical evidence,” which is given greater weight in the disability determination process.
6. • Conduct ongoing outreach and engagement with the individual who is homeless to stay connected throughout this process and to work with the individual to obtain other needed services and treatment such as housing, physical and mental health care, other support services, food, and clothing.
7. • Track and report to the Mississippi SOAR Data Liaison applications and outcomes, including number of applications completed, approvals/denials, and time to decision from application submission to receipt of SSA’s decision.

We estimate that this intensive work takes roughly 20-40 hours per applicant from first meeting to getting a decision on the claim. This time is usually spent over the course of 2-3 months though, certainly, it is expected to be more intensive in the first month. You will also be required to enter and track all SOAR applications in OAT (Online Application Tracking). User access to OAT is coordinated through the SOAR State Lead.

The benefit to your agency is that people you serve will have income and health insurance to meet basic needs which makes them more likely to stay in treatment, keep appointments, and pay their bills. Thus, if your agency is Medicaid (or Medicare) reimbursable, your bills will be paid. Without such work, individuals typically take anywhere from 1-3 years to obtain approval, during which time people are lost to the process and require a great deal of community support simply to survive. With the SOAR approach, we are seeing approvals on average in 89 days. Clearly, the rewards are great for all involved.