



SSI/SSDI Outreach, Access and Recovery

Illinois E-News

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Questions?

We're here to help!

Contact Beth Orchard in DuPage & Kane counties or **Sue Augustus** if outside this area.

Victory Laps: Stories of Success!

Briton—Outreach Case Manager, Northwestern Memorial Hospital

Bertha* was referred to Northwestern Memorial Hospital's Intensive Case Management (ICM) team after her second psychiatric hospitalization in 2 months. In addition to suffering from debilitating depression, she also had several serious medical complaints including Lupus, severe arthritis, and shoulder pain. Her medical issues limited her ability to work and complete basic ADLs, which contributed to development of depression. Bertha's family already helped her apply for disability twice in the past couple years, but she was denied due to insufficient evidence and documentation. **ICM helped her successfully link to outpatient mental health treatment and started a SOAR application to help her apply for benefits.**

ICM spent 2 months collecting medical and psychiatric evidence about Bertha's conditions. We then collaborated with her psychiatrist to compose a comprehensive medical summary report that detailed how her combination of ailments prevented her from maintaining gainful employment. She was approved for SSI **49 days** after her SOAR application was submitted to her local SSA office! **Thanks to SOAR Bertha is now receiving her monthly disability check,** which relieves stress for her family and gives her access to the care she needs to improve her overall quality of life.

Did You Know?

SOAR Q&A Webinar

On January 18, 2013 a webinar was hosted to facilitate discussion of SOAR. Some key takeaways:

**Know your SSA contact.* If you aren't sure about your contact at Social Security, a list of their names and locations is online at <http://www.mtcil.org/>. Please note you'll need your login name/password. Contact [Beth Orchard](#) if you've forgotten your login.

**Bringing documents to SSA.* If SSA does not take papers you bring to the appointment explaining a client's medical conditions, you can fill out the Medical Summary Report with this information or email [Beth Orchard](#) for the name of a liaison who can assist you with any problems you might encounter.

**Additional training would be helpful.* Training in Medicare/Medicaid issues, including implementation of the ACA and best practices is desired for completing Medical Summary Reports and strategies for collection of medical documentation for clients in the time allotted. Email [Beth Orchard](#) with questions.

Alexian Brothers Disabilities Training

Linda, a staff attorney and trainer from Prairie State Legal Services and I presented at Alexian Brothers on Documenting Disabilities. This presentation is designed to explore what Social Security looks for from providers and medical professionals to support disability applications. Ten staff members spent two hours learning about functional limitations, the sequential evaluation and what's most helpful in creating successful applications the first time. *The SOAR process was discussed as a tool* for providers to enhance success rates of applications.

If you would like information on this presentation, contact [Beth Orchard](#).

February



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SOAR Q&A

Q: *I'm doing my first SOAR application.*

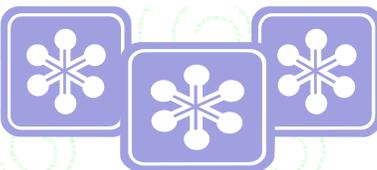
Any tips to get started?

A: Use the [SOAR timeline](#) to focus on the first week of the process. Start collecting medical records, creating a chronological history. [Locate the name of your SS contact and get a consent form signed.](#)

Last, but not least, **DON'T PANIC!**

Contact [Beth Orchard](#) for help or to set up a call to walk you through.

You can do it!



Have a success story to share? [Contact Beth Orchard](#) so we can print it in the next newsletter!

Meet Tahtia K. Smalling

Tahtia K. Smalling is the State PATH Coordinator and she works for the Illinois Department of Human Services/Division of Mental Health.

Ms. Smalling is a trainer and one of the "founding mothers" of SOAR in Illinois. PATH Providers outreach and engage persons who are vulnerable and underserved, and many enter the system both unfunded and uninsured. PATH Providers are encouraged to attend SOAR two-day trainings to become SOAR-certified. *Two (2) agencies have staff who are trainers and 18/20 PATH programs have staff members who are SOAR-certified.*



SOAR trainings teach participants effective strategies to successfully navigate the complex Social Security application process. Trainees are linked with the [Making The Connection Illinois website](#), and gain access to fundamental resources upon completion of the training. Ms. Smalling believes that the most important SOAR "take-aways" are for trainees to *practice the following principles:*

- (a) Keep your word. Developing a relationship of trust with applicants is key.
- (b) Repetition creates familiarity. Assemble a "step-by-step" template.
- (c) Network with colleagues to gain expertise in areas that are not your strong suit.
- (d) Complete and submit SOAR Data forms as you finalize applications. These documents are crucial to gauging the efficacy of the Illinois SOAR process.

"The future of SOAR in Illinois rests on the shoulders of each person reading this highlight. However you contribute, the collective goal should be to ensure that the individuals served are receiving consistent advocacy, support and assistance throughout the application process."

What's Up, SOAR?

Headlines

*2013 SSA Federal Benefit rate increased to \$710/month for an individual, \$1,066/month for a couple. For more information on 2013 SSA benefits, click [here](#).

*Make the switch! SSA goes electronic with payments starting March 1. For more information or to order free materials, visit this [website](#).

*Upcoming webinars: **Medicaid Eligibility, Enrollment And Outreach: Changes Coming.** Wed, Feb 27 from 3-5pm EST. [Register here!](#)

*Train the Trainer (TTT): SAMHSA SOAR Technical Assistance Center is offering training for 2 people per state to attend a TTT program. You must be recommended by our State Team Lead (Sue Augustus). Two events are still open in Pittsburgh, PA and Austin, TX. Contact [Beth Orchard](#) with questions or to fill out an application.