New Jersey Providers

Welcome to the SOAR Online Course: Adult Curriculum!

The SOAR Online Course: Adult Curriculum trains case managers to assist eligible adults who have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for the Social Security Administration (SSA) disability programs: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). The techniques taught in the SOAR Online Course can improve the quality and completeness of any application for SSI/SSDI, however, the label "SOAR" should only be used on SSI/SSDI applications for persons who are experiencing or at risk of homelessness.

Pages in this Course:

🔖 Course Introduction

🔖 01. The Need for SOAR ⊕
🔖 02. Initiating the Application ⊕
🔖 03. Exploring Basic Eligibility ⊕
🔖 04. Medical Information ⊕
🔖 05. The Link to Functioning ⊕
🔖 06. Completing the Application Packet ⊕
🔖 07. Supporting Resiliency and Recovery ⊕

🔖 Course Completion

The SOAR Online Course consists of seven classes, each of which has a series of articles, short quizzes, and a practice case. This practice case provides an opportunity for case managers to apply what they have learned by completing an SSI/SSDI application packet for a fictional applicant using SOAR techniques. Video interviews, medical records, and progress notes provide the information needed to complete five SSA forms and write a Medical Summary Report (MSR) for the fictional applicant.

The complete application packet is submitted to the SAMHSA SOAR Technical Assistance (TA) Center for review. Upon approval, the participant will receive a certificate of completion and 20 continuing education (CE) contact hours from the National Association of Social Workers (NASW). There is no charge for this course.

During the course, we will **check-in weekly via MS Teams (4 calls)** as a group to ask and answer questions, give status updates, and clarify any issues with the training. Note that while you will complete the course as part of a cohort, each case manager must do his or her own work. When you enroll in the SOAR Online Course: Adult Curriculum, you will need to agree to the following statement: *In completing the online curriculum practice case, case managers are required to do their work independently and not copy others or submit "joint" work. This is a requirement to receive a SOAR certificate of completion and 20 CEUs from the NASW*.

After the course, we will hold a **SOAR Online Course Review Session via MS Teams**, which gives you the opportunity to confirm and clarify information learned online and discuss local processes and tracking outcomes. Participants will be provided with a materials and tools packet that includes sample SSA forms and key SOAR worksheets and reference documents.

We estimate that it will take approximately 20 hours to complete the entire course and participants can work at their own pace, starting and stopping as they wish.
- **You will be completing two classes each week**
- **Please be prepared to set aside roughly 2-3 hours for each class**
- **You will need access to the latest version of Adobe Acrobat Reader or a printer and scanner to complete the training**

Cohort Tasks and Schedule

Dates	Course Class	Practice Case Tasks	Call Date/Time
November 2, 2023	Kick Off Call/Enroll in the Course	▪ Create a SOARWorks account (click "Login" on top right of page, then scroll to the bottom and select "Sign-Up") ▪ Enroll in the Course	**Thursday, 11/2 3:00-4:00pmET (MS Teams Link** to be sent separately to registrants)
November 9, 2023	Classes 1 and 2	**Class 1:** Download, and save all SSA forms; review the Practice Case Guide and the MSR Interview Guide and Template **Class 2:** Download and review the progress notes; complete and upload the SSA-1696 and SSA-827	**Thursday, 11/9 3:00-4:00pm ET**
November 16, 2023	Classes 3 and 4	**Class 3:** Download and review progress notes and medical records; begin the SSA-8000 and SSA-16 **Class 4:** Download and review medical records; complete and upload the SSA-8000 and SSA-16; begin the SSA-3368	**Thursday, 11/16 3:00-4:00pm ET**
Thanksgiving week- no call	Catchup week	**Get up to date or skip ahead!**	No Call This Week
November 30, 2023	Class 5, 6, and 7	**Class 5:** Complete and upload the SSA-3368 **Class 6:** Complete and upload your Medical Summary Report (using the MSR Template) **Class 7**: Review class on SSA work incentives	**Thursday, 11/30 3:00-4:00pm ET**
November 30 to December 7, 2023	Complete Practice Application	Submit your application packet and complete the course!	SAMHSA SOAR TA Center will review practice case materials and respond within 10 business days. No call.
December 7-15, 2023	Revise and resubmit any materials as requested		
January 11, 2024	Attend **SOAR Online Course Review Session**. (**1/11 from 3-4pm**); MS Teams link to be sent to course completers.		

SOAR Online Course: Adult Curriculum

SOAR is a national program, sponsored by the Substance Abuse and Mental Health Services Administration (SAMHSA), 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.

SUPPLEMENTAL SECURITY INCOME (SSI) AND
SOCIAL SECURITY DISABILITY INSURANCE (SSDI):

Many people with disabilities who experience or are at risk of homelessness, (e.g., those returning to the community from institutions such as jails, prisons, or hospitals), struggle to access the resources they need. Many suffer from disabling mental illnesses, co-occurring substance use, trauma, and medical issues that impact their ability to work. The path to recovery can be extraordinarily challenging when one is constantly struggling to meet basic needs. Having income and health care benefits is often a critical first step on the road to resiliency and recovery.

- Course is FREE, web-based, and self-guided
- Training takes approximately 20 hours to complete
- Support available from the SAMHSA SOAR TA Center and local SOAR Leaders
- Complete a full practice SSI/SSDI application for a fictional adult, including a Medical Summary Report
- Receive individualized feedback from experts at the SAMHSA SOAR TA Center on the practice SSI/SSDI application
- Earn 20 free Continuing Education Units from the National Association of Social Workers upon successful completion

Enroll today! https://soarworks.samhsa.gov/online-courses

SAMHSA
Substance Abuse and Mental Health Services Administration

SOAR Online Course: Adult Curriculum

Training Cohort Registration Form

Please complete one registration form per person and submit by: _____

Registrant Information:

First Name: _____ Last Name: _____

Title: _____

Organization Name: _____

City: _____ County: _____

Phone: _____ E-mail: _____

1. How many individuals do you currently help apply for SSI/SSDI per year? _____

2. After completing this training, how many individuals per year would you expect to help apply for SSI/SSDI using the SOAR model? _____

By signing below, we acknowledge the expectation that the registrant will:

- Complete the SOAR Online Course
- Use the SOAR model to complete SSI/SSDI applications
- Participate in ongoing SOAR-related learning opportunities
- Undertake the key components of the SOAR process, including:
    - Participating in local quality review processes
    - Attending local refresher trainings and other learning opportunities
    - Maintaining communication with your SOAR Local Lead
    - Submitting application data and outcomes using the SOAR Online Application Tracking (OAT) program or other official tracking method

Registrant name: _____ Registrant signature: _____

Supervisor name: _____ Supervisor signature: _____

Date: _____

Please return this completed Registration Form to: _____

_____

_____

Questions? Contact _____ at _____ or _____ .