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Learning Community Call #1
SOAR
SSI/SSDI Outreach, Access and Recovery
Technical Assistance Initiative

PRESENTED BY:
SAMHSA SOAR TECHNICAL ASSISTANCE CENTER
POLICY RESEARCH ASSOCIATES, INC.

UNDER CONTRACT TO:
SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

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Welcome!

Kristin Lupfer, Project Director

SAMHSA SOAR TA Center

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Agenda

- Welcome and Introductions
- Pre-Pilot Survey Results and Trends
- The Approval is Only the Beginning
- LC Topic #1: Identifying SOAR Applicants
- LC Topic #2: Supporting High Quality SOAR Applications
- Homework Assignment
- Wrap-Up and Adjourn

Logistics

- Downloading materials
- Poll questions
- Chat questions
- Group Discussions
- Q&A

Introductions

- SOAR TA Center Staff
- Learning Community Participants
  - State team introductions (2 minutes maximum)
  - AZ, CO, CT, IL, MA, MS, NV, OH, TN, UT, WI
    1. Composition of state team
    2. What you hope to achieve through this pilot

Pre-Pilot Survey Results and Trends

Jen Elder, National Policy and Partnerships Coordinator

SAMHSA SOAR TA Center

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Pre-Pilot Survey Results

- 9 states returned the survey
- 5 one-year grants; 4 two-year grants
- Start of services:
  - Five began Fall 2015
  - Three between January and March 2016
  - One will begin in June 2016
- 32 sites (many sites cover numerous counties)

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Pre-Pilot Survey Trends

How SOAR/IPS Integration will benefit consumers:
1. Increases options for maximizing income
2. Gives providers a more structured approach to assisting individuals
3. Enhances connection to the community and improves self-worth for individuals

Strengths:
1. Knowledge and resources of SOAR and IPS staff
2. Potential to increase income supports for individuals

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Pre-Pilot Survey Trends

Reported Barriers to Implementation:

1. Misunderstandings about working while receiving disability benefits and fear of work/losing benefits
2. Infrastructure needs (additional staff, tracking mechanisms, staff turnover), coupled with short time frame

Other trends:

- No states reported individuals having income from employment before or after SSI/SSDI award (*see below)
- States are in the beginning stages of collaboration between SOAR and IPS/employment and many lack formal assessment and data tracking procedures for combined services

How Results Will Guide Learning Community and Pilot

Goals:

1. Increase understanding and resources related to working while applying for and after receiving SSI/SSDI

2. Create system-wide assessment and referral procedures and strengthen relationships between SOAR and IPS staff

3. Strengthen data tracking related to income supports from SOAR and employment

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The Approval Is Only The Beginning:
Encouraging Employment, Accessing Housing & Other Services

Pam Heine, Senior Project Associate

SAMHSA SOAR TA Center

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Working for More than Income

- Self-worth and self-confidence

- Define a role for the person in the community

- Foster a connection to others

- Add structure to daily life

- Critical step in recovery

Common Myths

- If you work, your SSI/SSDI application will be automatically denied

- Benefits and health insurance end immediately when you start working

- You can only work part-time while receiving disability

- If Social Security knows you are working, they will say you aren't disabled anymore

Start Talking About Work

- Begin the conversations early and have them often

- Remind the individual that it is their decision, let him/her weigh pros and cons

- Provide reassuring and encouraging messages

- Ensure the applicant is equipped with accurate information about working while applying for and receiving SSI/SSDI

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While Applying for SSI/SSDI

You <u>can</u> work during the application process

SSA looks at the type and amount of work
- Earn up to $1,130/month* (SGA for 2016)

Strategy: Encourage work from the start

- Can help to strengthen the application
- Might find that supported employment works better for individual

Some work incentives can apply to reduce countable income

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Poll Question

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Topic #1: Identifying SOAR Applicants

Jen Elder, SOAR TA Center

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The SOAR Applicant

Who can be helped by SOAR?
- Adults who are experiencing or at risk for homelessness
- *And* who have mental illness, co-occurring disorders or other physical disabilities

Who is considered "homeless"?
- Moving from place to place throughout the month
- Living "doubled-up"
- Living in uninhabitable housing, outside or in shelters

Who is considered "at-risk for homelessness"?
- Living in unstable or non-permanent housing
  - Exiting jails or prisons with no stable place to live
  - Permanent housing for those recently experiencing homelessness with limited income or relying on grant funding to sustain housing
  - Youth transitioning out of foster care

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Definition of Disability

1. Medically Determinable Physical or Mental impairment
   - Illness must either meet or be equivalent to the "listing" criteria used by DDS. Supporting information must be documented in medical records

2. Duration
   - The impairment tied to the illness(es) must have lasted OR be expected to last 12 months or more OR be expected to result in death

3. Functional Information
   - Applicants must demonstrate that significant functional impairment related to the impairment(s) exists that impede their ability work, i.e.) unable to work at Substantial Gainful Activity (SGA) levels ($1,130 for 2016)

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Make the Link to Work

- The question DDS must answer is: "Can the person work and earn SGA ($1,130 for 2016)?"

- Disability must meet the criteria in SSA's "Listings of Impairments"

- Must make the link between a person's illness and his/her *inability to function* in a work setting

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Identifying SOAR Applicants

Make the Tool Work For You

- Identify individuals who most need your assistance
- Do not discourage anyone from applying for SSA benefits
  - Plan for alternative service or referral
- Consider adding your program acceptance criteria
- Use in conjunction with other assessment tools
- Consult with colleagues or the SOAR TA Center

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Group Discussion

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Topic #2: Quality Review of SOAR Applications

Kristin Lupfer, SOAR TA Center

Why Pay Attention To Quality?

- Ensuring quality applications is a key SOAR Critical Component
- Increases the likelihood of approval on initial application
- Increases the expertise and skills of SOAR case managers
- Identifies challenges that can be resolved by the local SOAR steering committee
- Maintains good relations with SSA and DDS

How To Spot Quality

- Complete information
- Online form submission
- Medical records indicating impairment
- Detailed functional summary
- Doctor's co-signature (when possible)
- Timely communication with SSA/DDS

SOAR Application Checklist

A Complete SOAR Packet Includes:

1. SOAR Checklist as a cover sheet for the completed application package
2. SSA-1696 Appointment of Representative form
3. SSA-827 Authorization to Disclose Information to SSA
4. SSA-8000 signed and dated by applicant
5. MSR signed by the SOAR provider as well as the applicant's physician or psychologist
6. Copies of all medical records in chronological order
7. SSA-3368 and SSA-16 submitted on-line **24-48 hours** before turning in completed application package (Items 1-6)

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More SOAR Tools…

SOAR Website: https://soarworks.prainc.com/article/soar-tools-and-worksheets

- Definitions of Homelessness
- Identifying SOAR Applicants
- Steps to Completing an SSI/SSDI Application Using the SOAR Model
- SOAR Checklist for Initial Claims
- Medical Summary Report (MSR) Interview Guide and Template

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Group Discussion

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Homework Assignment

Jen Elder, SOAR TA Center

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Homework

- Outline current identification and quality review practices you have in place.

- Bring existing outcomes, if available

- Prepare 1-2 slides with information and send to Jen Elder (jelder@prainc.com) by close of business Wednesday, May 11th

- States will present findings (3 minutes maximum) to the group on the next call

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Wrap-Up and Adjourn

- Questions or Comments?

- Next call: May 12, 2016 3:00-4:30pm EDT

- Thanks for your participation!

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