

A background image of white flowers with green buds, likely a species of Ranunculus, set against a blurred green background. A semi-transparent red-bordered box is overlaid on the image, containing the text "2023 SAMHSA SOAR AUGUST E-NEWS".

2023 SAMHSA SOAR AUGUST E-NEWS

New SOAR Resources

Encouraging Employment: Self-Employment

Individuals who receive SSI/SSDI benefits can combine their benefits with employment income. Self-employment or “gig work” may be an opportunity to maximize income for individuals who prefer a less formal, more flexible, and individualized employment option. Check out our [new resource](#) outlining opportunities, considerations, and resources for self-employment and gig work for people with disabilities.

Standard SOAR Process for Completing SSI/SSDI Applications

The creation of a SOAR Process is a collaborative effort between SOAR providers, the Social Security Administration (SSA), and Disability Determination Services (DDS). Agreed-upon steps and procedures enable SOAR-trained practitioners to complete the SSI/SSDI application process efficiently and effectively. We recommend reviewing the steps to completion for both new and seasoned practitioners.

While the *Standard SOAR Process* is recommended, many communities tailor it to fit their needs. SOAR providers should check with their SAMHSA SOAR TA Center Liaison and SOAR State/Local Leads to see if there is an established SOAR Process in their area.

August Spotlights

Indian Health Service & Department of Veteran Affairs Launch New Interagency Map Application for Native Veterans

The Indian Health Service and the Department of Veterans Affairs have launched a new interagency driven map application, [Find Health Care & Resources for Native Veterans](#), to better serve the healthcare needs of Native Veterans across the country. The interactive map integrates location-based data from 41 urban Indian organizations with 82 locations and 1,500 Veteran Affairs health care facilities. This innovative tool aims to

address the significant disparities in health outcomes and access to care that Native Veterans often experience. Native Veterans can use this centralized platform to easily locate and connect with healthcare facilities, mental health clinics, and other resources tailored to their specific needs and cultural backgrounds.

This collaboration builds upon the [Native American Veteran Homelessness Initiative](#) led by the White House Council on Native American Affairs Health Committee. Along with helping Native Veterans find health care, this tool also identifies resources to address homelessness. The VA offers a [wide array of services](#) to help Veterans – Native and non-Native – who are at-risk of or experiencing homelessness, including emergency and transitional housing services, permanent housing services, case management, employment programs and more.

The SOAR model’s culturally sensitive engagement process and holistic approach to SSI/SSDI application assistance can also be a critical support for American Indian and Alaska Native (AI/AN) community members. The SAMHSA SOAR TA Center has published culturally tailored resources to facilitate working with Native communities and serving Native clients:

[A Toolkit for Engaging with Native Communities](#)

[SOAR for American Indian and Alaska Native Communities](#)

Funding Success in Indiana

The Indiana State Contact for the Projects for Assistance in Transition from Homelessness (PATH) program and SOAR State Team Lead, Melissa Carroll, worked with the State of Indiana to set aside nearly \$900,000 in leftover ARP-A funds to support 10 dedicated SOAR positions at PATH teams throughout the state. Positions are expected to begin in early September and will be funded for 1 year.

From State Team Lead Melissa Carroll:

“We are extremely excited to be able to utilize this funding for SOAR and expand access to the service throughout the state. There’s such a high need for [assisting people experiencing] homelessness throughout the state and increasing our number of SOAR providers will be so valuable in connecting them to income and other supports.”

See How SOAR Works



Sharing Our Successes

SOAR Success at Park Center in Nashville, Tennessee

The following SOAR success story was submitted by Christy Spangler, SOAR State Team Lead, Tennessee.

Park Center received a referral for someone who had previously been through their SOAR program and had received an approval back in 2010. He was incarcerated in 2016, which caused him to lose his benefits. When the referral was made, he was staying with his sister but was told he needed to move out soon. Park Center worked diligently to get his application resubmitted. The SOAR specialist was able to get him a mental status exam completed as the last piece needed for his claim. He was approved! He is now able to stay with friends since he has an income and is working with the outreach team to get needed documents for housing navigation. He is hopeful that he will be able to find a place to call his own soon!

Have a story of your own? [Submit your SOAR success!](#)

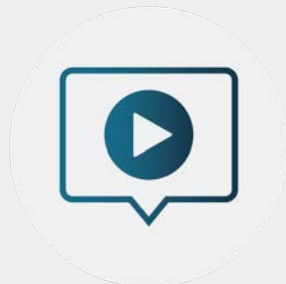
Sharing Our Successes stories are edited for brevity and clarity. All beneficiary names have been changed to protect anonymity.



SOAR Tip: Setting the Protective Filing Date (PFD)

Setting the applicant's Protective Filing Date (PFD) correctly is one of the first steps to submitting a successful SSI/SSDI application! The SAMHSA SOAR TA Center recently [released a video](#) that takes you step-by-step through this process. There are tips for creating a *my* Social Security Account and guidance for setting the PFD when an applicant cannot create an account. The video is a great refresher for anyone who completes SOAR-assisted SSI/SSDI applications!

Upcoming Events



Webinar: Documenting and Supporting SSI/SSDI Applications Involving Substance Use Disorders

August 23, 3:00-4:30pm ET

This webinar will include panelists from the SAMHSA SOAR TA Center, a SOAR Provider, and a Division of Disability Determination Services (DDS) Professional Relations Officer. The presenters will discuss SSA's DA&A (Drug Addiction & Alcoholism) policy and the concept of "materiality" and how to demonstrate to DDS that past or ongoing substance use is not material to a finding of disability. We will share examples of effective descriptions from redacted Medical Summary Reports (MSRs) written by panelists. Also, our DDS panelist will discuss how SSA evaluates claims where medication-assisted treatment and medical marijuana are present. You will hear from a SOAR beneficiary from *Heading Home*, who will join the panel to share their experiences with the SOAR process.

This webinar will be helpful to SOAR-trained case managers who are looking for examples of how to interview applicants with histories of substance use disorders. Tools developed by the SAMHSA SOAR TA Center will be shared to further assist participants in interviewing applicants with substance use disorders and translating this information into the MSR.

[Register for the Webinar](#)



SOARing Over Lunch Conference Call

August 15, 1:00–2:00 p.m. ET

The SAMHSA SOAR TA Center holds informal monthly calls designed to help support SOAR efforts across the country.

[Read more about SOARing Over Lunch and add it to your calendar.](#)

Federal Updates

SSA's Expansion of Health Information Technology (HIT) Partners to Obtain Medical Records for Disability Claims

SSA has been expanding its use of Health Information Technology (HIT) to automate how medical evidence is obtained. HIT is a continually growing SSA program that uses technology to bring the speed and automation of medical evidence collection to the disability determination process. For example, when a SOAR case manager lists a medical provider in the Disability Report (SSA-3368) who is a [HIT partner match](#), the medical records for the timeframe noted will be transmitted directly (within minutes or hours) into the applicant's electronic folder. So, by the time a claim is assigned to a DDS examiner, the records from this provider will be available for their review!

As of May 1, 2023, all states have a least one participating health partner (229 organizations representing 35,996 participating providers). SSA plans on updating this [list](#) periodically, which is sorted by provider name, not state. Check the list to see if there are any organizations in your state with participating facilities.

SSA welcomes the support of SOAR providers in helping to bring this program to healthcare providers and hospital systems in their communities. SSA maintains full responsibility for recruiting and onboarding HIT providers. Reach out to your [DDS contacts](#) to find out more about how HIT is operating in your state and find out how you can help increase participation, especially by providers in rural areas and low-income communities.

While SSA's HIT program is a great use of technology, remember that obtaining applicants' medical records is a cornerstone of the SOAR model. SOAR providers will continue to gather medical records prior to the submission of the application packet to SSA. These records assist us in writing the Medical Summary Report (MSR) and assessing all medical conditions, including substance use.

SSA HIT Resources:

[Health Information Technology \(HIT\)](#)

[HIT | Getting Started](#)

[Health IT Partner Organizations as of 05-01-23](#)

Practical Guide for Implementing a Trauma-Informed Approach

SAMHSA has issued a new [Practical Guide for Implementing a Trauma-Informed Approach](#). The primary goal of this guide is to expand the discussion presented in SAMHSA's previous resources on trauma ([Concept of](#)

The guide specifically focuses on tools and strategies for implementing a TIA. It highlights the need for organizational assessment of readiness and capacity before implementing TIA and describes strategies for such assessments. The guide also describes implementation strategies across the following 10 domains: Training and Workforce Development; Governance and Leadership; Cross Sector Collaboration; Financing; Physical Environment; Engagement and Involvement; Screening, Assessment, and Treatment Services; Progress Monitoring and Quality Assurance; Policy; and Evaluation. The guide is intended for anyone involved in organization-level change, including practitioners, state and local officials, policy makers, federal and non-federal funders, peers, and family members.

Partner Updates

HHRC August Webinar Series: Peer-Delivered Services

The Peer Support Experience: In Our Own Words

August 10, 2:00-3:00pm ET

This webinar, led by panelists currently providing peer services, will introduce a new toolkit developed to provide guidance and strategies to integrate and sustain peer workers within homeless service organizations. Speakers will explore the impact of peer-led services on outcomes, identify opportunities for support, and reflect on their experiences with onboarding and daily operations in these roles.

[Register for this webinar](#)

Employing Peer Workers: An Organization's Perspective

August 29, 2:00-3:00pm ET

In this webinar, panelists will answer questions about the challenges and opportunities organizations experience when establishing new peer roles. Leaders at organizations with established peer roles will talk about the process of onboarding peers, such as building organizational buy-in, addressing stigma in policies and in the workplace, and recruiting and employing peer workers in an equitable way.

[Register for this webinar](#)

SOAR Jobs





- **Maryland:** Harford County Office on Mental Health - *SOAR Specialist:* Submit SSI/SSDI applications using the SOAR model for individuals with severe mental illness who are experiencing or at risk of homelessness. This is a remote-friendly position, with the requirement to report in person for mandatory trainings, staff meetings, face-to-face assessments & follow-up activities, and any other requests from your direct supervisor.
- **Pennsylvania:** Pittsburgh Mercy - *SOAR Benefits Specialist:* Assist eligible adults to apply for SSI and SSDI benefits using the SOAR model. Conduct interviews and assessments, collect medical records, author detailed Medical Summary Reports, and partner with SSA/DDS to facilitate the entirety of the SSI/SSDI application process.
- **Florida:** SMA Healthcare - *SOAR Processor:* Complete SOAR applications and provide specialized training, advocacy, and assistance to consumers who may be eligible and wish to apply for SSI/SSDI benefits.

Learn more about these positions on the [SOARWorks website](#). Do you have a job posting you would like to share with the SOAR community? Please submit it to the [SAMHSA SOAR TA Center!](#)

More From SOAR



Contact Us



The Substance Abuse and Mental Health Services Administration (SAMHSA) SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance (TA) Center is sponsored by SAMHSA, U.S. Department of Health and Human Services (HHS).

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