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Getting Started Completing SOAR-assisted SSI/SSDI Applications

Presented by the Substance Abuse and Mental Health Services
Administration (SAMHSA)

SOAR Technical Assistance (TA) Center

U.S. Department of Health and Human Services

April 11, 2019



SAMHSA
Substance Abuse and Mental Health
Services Administration

Disclaimer

The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).

Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Questions and Answers

Purpose and Objectives

- How to access and utilize SAMHSA SOAR tools and worksheets that can help you in the SSI/SSDI application process
- Why it's important to create and implement an agreed upon SOAR Process between your SSA and DDS offices
- How to apply best practices shared by SAMHSA SOAR TA Center and SOAR Providers on getting started with completing SOAR-assisted SSI/SSDI applications

Agenda

Getting Started in Las Vegas!

- Wayne Young, Director of Public Benefits and Kim Fiore, SOAR Specialist and Southern Nevada SOAR Local Leads, Wellcare Services, Las Vegas, Nevada

Getting Started in Vancouver, Washington!

- Suzanne Straub, SOAR Coordinator and SOAR Local Lead, Community Services Northwest, Vancouver, Washington

SOAR Provider Experience with Getting Started

- Katie Lundy, SOAR Benefits Specialist, Visiting Nurse Association, Community Services, Abington, Pennsylvania

Questions and Answers

- Facilitated by the SAMHSA SOAR TA Center

Welcome!

Mark P. Jacobsen, Ph.D.
Public Health Analyst
Office of Program Analysis and Coordination
Center for Mental Health Services
Substance Abuse and Mental Health Services Administration

April 11, 2019



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Substance Abuse and Mental Health
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SOAR Leadership Structure



SOAR TA Center

- Facilitates strategic planning meetings
- Conducts Leadership Academies, webinars, & learning communities
- Develops resources, including SOARWorks, the SOAR Online Course, and OAT
- Provides TA at all stages of SOAR implementation

State Team Lead

- Facilitates state steering committee
- Directs plans to grow & sustain statewide activities
- Serves as liaison to localities
- Maintains relationships with SSA & DDS
- Submits SOAR outcomes to the TA Center

Local Lead

- Facilitates local steering committee
- Directs local implementation plans
- Facilitates SOAR Online Course cohorts
- Conducts SOAR Fundamentals trainings
- Ensures quality applications & reports outcomes

Case Manager

- Completes high-quality SSI & SSDI applications using the SOAR model
- Communicates with local SSA & DDS representatives
- Tracks application outcomes

- *OAT: Online Application Tracking Program
- *DDS: Disability Determination Services
- *TA: Technical Assistance

Getting Started in Southern Nevada!

Wayne Young and Kim Fiore
Southern Nevada SOAR Local Leads
Wellcare Services
Las Vegas, Nevada

February 21, 2019



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Follow Up Support for SOAR Trainees

- Share with SOAR trainees about my role as Local Lead.
 - Serves as liaison to SSA/DDS to streamline questions, e.g.) for applicants and staff
 - Provides TA support throughout the claims process, e.g.) navigating the system, payee services, insurance questions, ticket to work, etc....
 - Talks about what case management could look like, e.g.) requesting medical records, transporting to medical appointments.

TOOL: SOAR Process Template

- Nevada has established a SOAR Process with SSA and DDS.
- This guides how SOAR-assisted applications are submitted to SSA and DDS.
- Includes contact information for SSA and DDS representatives.



SSI/SSDI Application Process Template for SOAR-Assisted Claims

Customize this template to fit the needs of your local community

Creating a SOAR Process is a [collaborative effort](#)¹ between SOAR providers, the Social Security Administration (SSA), and Disability Determination Services (DDS) to establish procedures and expectations for the processing of SSI/SSDI applications submitted by SOAR providers. It is flexible and allows for customization to reflect local preferences (e.g. hand delivery vs. electronic submission, methods of requesting SSA status, etc.). Establishing a SOAR Process helps to ensure that SOAR providers are following procedures agreed upon by SSA/DDS and sets expectations for submission of high quality, complete SSI/SSDI applications.

1. Gather information on prior/pending claims (if necessary)

- The SOAR provider will have the potential applicant complete and sign the SSA-3288: *Consent for Release of Information*, if requesting information about a prior or pending SSI/SSDI application.]
- The local SSA office contact will respond by providing requested information about the applicant's prior or pending claims.

2. Set the protective filing date (PFD)

- The SOAR provider will assist the applicant in setting the PFD via **one** of these methods:
 - Initiating the Online Disability Benefits Application at <https://www.ssa.gov/benefits/disability/> and stopping when reaching the re-entry number screen; or
 - Calling SSA to set an appointment for an in-person or telephone interview; or
 - Visiting the local SSA office with the applicant

Tool: Identifying SOAR Applicants

- Using the Tool “*Identifying SOAR Applicants*” who most need our assistance.
- Do not discourage anyone from applying for SSA benefits
 - Plan for alternative service or referral
 - Consider adding your program acceptance criteria



Identifying SOAR Applicants

This tool is intended to help case managers identify adults who are experiencing or at risk of homelessness who may be eligible for Social Security Administration (SSA) disability benefits. While we do not want to discourage anyone from applying for SSA benefits, this tool should help you identify individuals that most need your assistance with their application.

SOAR is designed to serve individuals who are able to apply for disability benefits as an adult under SSA rules. This includes persons 18 years of age or older as well as individuals who are within one month (180 days for youth who are aging out of the foster care system) of their 18th birthday. Individuals age 65 or over with low income and resources may be eligible for SSI based on age or be eligible for retirement benefits based on their work history (individuals aged 62-67, depending on year of birth, may be eligible for early retirement benefits).

Key Eligibility Criteria: *The following 4 characteristics represent key eligibility criteria for SSA disability benefits*

- Applicant has a serious mental illness or exhibits symptoms and/or has serious physical illnesses that affect his/her ability to work at a substantial gainful level (\$1,220/month in 2019)
- The illness(es) or condition(s) have lasted or are expected to last for at least 12 months (or result in death)
- Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevents sustainable employment. For example:
 - Psychotic Symptoms (positive or negative)
 - Depressive Symptoms (decreased energy, lack of motivation, suicide attempts)

Tool: Steps to Completing an SSI/SSDI Application

- This guide will help you complete an SSI/SSDI application using the SOAR model.
- You have 60 days from the protective filing date to submit a complete application packet to the Social Security Administration (SSA).
- We encourage you to complete the process in less time as you are able.
- These steps are reliant upon the SOAR Process established in your state or community.



Steps to Completing an SSI/SSDI Application using the SOAR Model

This guide will help you complete an SSI/SSDI application using the SOAR model. You have 60 days from the protective filing date to submit a complete application packet to the Social Security Administration (SSA). We encourage you to complete the process in less time as you are able.

Documents needed to complete the process:

- SOAR Checklist for Initial Claims (used as cover sheet of application package)
- SSA-3288: Consent for Release of Information (*optional, see below*)
- SOAR Medical Summary Report (MSR) Interview Guide and Template
- SSA-827: Authorization to Disclose Information to SSA
- Agency Release of Information
- SSA-1696: Appointment of Representative
- SSA-8000: Application for Supplemental Security Income (SSI)
- SSA-16: Application for Social Security Disability Insurance (SSDI)
- SSA-3368: Adult Disability Report

Step One

- If you need to verify whether the applicant has a pending SSI/SSDI application, complete and submit the SSA-3288 or call the local SSA office while with the applicant.
 - The SSA-3288 can also be used to request records from SSA about prior SSI/SSDI applications.

Organizing Your Effort

- Make a file for each applicant
- Prepare files in advance with intake forms, SSA Forms, SOAR Tools, etc.
 - Include a contact list for SSA representatives, DDS examiners, local medical providers and medical records departments
 - Create sections for:
 - Medical records
 - SSA/DDS correspondence

Prior or Pending SSA Claims

- ***If*** you need to verify whether the applicant has a pending case at SSA, submit the SSA-3288: *Consent for Release of Information* or call SSA with the applicant
- The SSA-3288 can also be use to request records from SSA about prior SSI/SSDI applications
- If you are certain that the applicant has never filed, or if you don't need information about a prior claim, you can skip this step!

Setting the Protective File Date

1. <https://www.ssa.gov/disabilityonline>
2. Click “Start a New Application” and answer some preliminary identification questions
3. Select ‘I am applying for myself.’
4. If the applicant does not already have a my Social Security account, create one!
5. Stop and exit after completing the first tab and receiving a reentry number

Setting the Protective Filing Date

- If the applicant is **not able** to create a my Social Security account and you want to set the Protective Filing Date online :
 - 1) Navigate to <https://www.ssa.gov/disabilityonline>
 - 2) Click “Start a New Application” and answer some preliminary identification questions
 - 3) Select ‘I am helping someone who is not with me, and therefore cannot sign the application at this time.’
 - 4) Input the required information and **STOP** at the reentry number!
- Note that SSA will mail a copy of the application to the applicant that they will need to sign and return.

Re-entry Number Screen

The screenshot shows the Social Security Administration's 'Apply for Benefits' page. At the top, it says 'Social Security The Official Website of the U.S. Social Security Administration'. Below that, the page title is 'Apply for Benefits'. A progress bar shows four steps: 1. Provide Background Information (active), 2. Provide Disability Information, 3. Sign Medical Release, and 4. Confirmation. Below the progress bar are tabs for 'Identification', 'General', 'Other Benefits', 'Remarks', and 'Review & Sign'. The 'Identification' tab is selected. A blue box contains the text: 'You must print this page or write down the re-entry number.' followed by 'Re-entry Number: 36477191'. Below this, it explains that if the user exits or chooses to save and return later, they must use this number to continue. It also states that if the user loses the number, they will need to start a new application. A 'Print this page' link is provided. To the right, a sidebar titled 'In this section...' lists several sections with checkmarks: Applicant Identification, Preparer's Contact Information, Contact Information, Birth and Citizenship, Re-entry Number (highlighted), Other SSNs and Names, and Disability. At the bottom, a section titled 'Things you should know about Joan Public's application' contains a notice: 'We may use 01/24/2014 as the official date of this application. In order to use 01/24/2014, we must receive the signed application by 07/25/2014 or Joan Public may lose Social Security benefits.'

Do not proceed beyond this page
until you are ready to submit a complete application to
SSA!

SOAR Critical Component: Collecting Medical Records

- Gathering medical records *prior to the* submission of the application packet ensures that DDS receives complete information quickly and without duplication of effort
- Start the collection process early and work on other aspects of the application while you are waiting for records
- Building relationships with medical records departments will help you obtain records more quickly and sometimes free-of-charge
- SOAR Tool: Sample Medical Records Tracking Worksheet

Follow Up Support for SOAR Trainees

- SOAR Local Leads shares Southern Nevada Provider list which includes; address, phone, fax, special requests:
 - Hospitals (Health Information Management Depts.)
 - Detention Centers
 - Behavioral Healthcare
 - Jails/Prisons
 - Drug Addiction Treatment Centers

Submitting the SOAR Application

- This procedure is part of the SOAR program negotiated for your community.
- When you drop off the application packet, note whom you delivered it to and confirm that they have everything they need.
- Some communities prefer that you fax or upload medical records and the MSR directly to DDS
- Obtain a receipt for the application submission

A Complete SOAR Packet Includes...

1. *SOAR Checklist for Initial Claims* (used as a cover sheet)
2. SSA-1696: Appointment of Representative form
3. SSA-827: Authorization to Disclose Information to SSA
4. SSA-8000: Application for SSI
5. MSR signed by the SOAR provider as well as the applicant's physician, psychologist or other Acceptable Medical Source
6. Copies of all medical records in chronological order (to be faxed to DDS or submitted using Electronic Records Express (ERE))



The image shows a document titled "SOAR Checklist for Initial Claims". At the top, it features the "SOAR WORKS" logo, where "SOAR" is in blue and "WORKS" is in grey with a yellow arrow pointing from "SOAR" to "WORKS". Below the logo, the title "SOAR Checklist for Initial Claims" is centered. Underneath the title, a note in parentheses says "(Complete checklist and place on top of application packet before submitting to SSA.)". The form includes several fields for information: "Date:" followed by a blank line; "Claimant's Name:" followed by a blank line and "SSN:" followed by a blank line; and "Caseworker's Name:" followed by a blank line and "Phone #:" followed by a blank line. Below these fields, there is a section titled "Paper Forms" with three checkboxes: SSA-8000: Application for Supplemental Security Income (SSI), SSA-827: Authorization to Disclose Information to SSA, and SSA-1696: Appointment of Representative. Following this is a section titled "If applicable:" with two checkboxes: SSA-3373 Function Report (Only needed if a medical summary report according to the SOAR training is NOT submitted), and SSA-4814 Medical Report on Adult with Allegation of Human Immunodeficiency Virus (HIV) Infection. At the bottom of the form, there is a section titled "On-line Forms".

Getting Started in Vancouver, Washington!

Suzanne Straub

SOAR Coordinator and Local Lead
Community Services Northwest
Vancouver, Washington

February 21, 2019



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Overview of Clark County's SOAR Program

- Clark County SOAR History:
 - Started out as a PATH (Projects for Assistance in Transition from Homelessness) Project Case Manager in 2011.
 - Attended 2-Day in-person training.
 - Successfully completed 3 applications.
- In less than a year, eligible PATH clients obtained nearly \$17,000 in back payments and an average of \$698 a month in disability benefits.
- In 12 months a total of 26 people were assisted with applying for disability using SOAR model.

Overview of Clark County's SOAR Program

- In 2012, Clark County put out a request for application (for the distribution of funds that came from document recording fees) called Community Funds.
- Funds to be allocated to innovative programs that would affect homeless population.
- Community Services NW (CSNW) applied for funds to start SOAR Initiative and fund a full-time SOAR Coordinator.
- Program strengths were:
 - increased income leads to stable housing,
 - relieves local/state programs from supporting individuals, and
 - significant step in an individual's recovery.
- Program has continuously been funded since 2013!

Overview of Clark County's SOAR Program

- SOAR Coordinator position has increased community partnerships, collaborated with Social Security Administration and Disability Determination Services.
- Implemented Clark County SOAR Packets.
- Designed a hybrid SOAR training.
- Distributes monthly newsletter.
- Maintains Clark County SOAR webpage.
- Hosts bi-monthly SOAR Collaboration Meetings.

Overview of Clark County's SOAR Program

- Monthly newsletter includes
 - Updates from Social Security Administration
 - Overview of trainings/collaboration meetings
 - Recognition of Outstanding work
 - Running total of applications submitted, approvals, and retroactive payments
 - Upcoming training dates/time/location
 - Mental health quote

Clark County SOAR
October 2018

SOAR Collaboration Meeting
October 18th, 2018
Compassionate Allowances

SOAR WORKS
WASHINGTON

Compassionate Allowances (CAL) are a way to quickly identify diseases and other medical conditions that, by definition, meet Social Security's standards for disability benefits.

These conditions primarily include certain cancers, adult brain disorders, and other terminal illnesses.

The CAL initiative helps reduce waiting time to reach a disability determination for individuals with the most serious disabilities.

Compassionate Allowances follow the same approval process, but allow for a quicker decision based on the following:

- Quick approval-the process is sped up for CAL's in order to expedite funds to the disabled individual
- No extra work required on the application-the application process is the same. The only difference is identifying the disability and SSA recognizing it as a CAL.
- Payments aren't instant-while they can happen fast, payments aren't always right away. There may be a need for additional information before payment can begin
- Medicare is awarded after the normal waiting period-A qualified individual still must wait 24 months before receiving Medicare
- Potential eligibility for retroactive payments-someone who qualifies for a CAL could still be eligible for a back-payment to the date their disability began

SOAR Numbers


January 2018-Present
Applications: 8
Approved: 10
Denied: 2

January 2013-Present
Applications: 174
Approved: 82
Denied: 49
Back Pay Total: \$335,171

Upcoming Events

SOAR Training:
March 2019
Date TBC

SOAR Collaboration Meeting:
December 20th, 2018
9:00-10:00 am
Merrivether Place



Recognition of Outstanding Work

Share Staff

Share has always been outstanding when it comes to sending their staff to the SOAR trainings, but the training in September was particularly full of Share staff! Share has been dedicated to training their staff as well as ensuring their staff stay up-to-date on the latest information by sending their staff to our bi-monthly SOAR Collaboration Meetings!

Our most recent meeting this month, Share staff took an active part in the conversation about Compassionate Allowances, brainstormed ideas for clients, and sought to better understand ways to better assist their clients who already have disability benefits. They shared how their housing teams work with other case worker's clients within their department on SOAR applications to make sure things good smoothly! This is such a great deal!

Thank you Share for always being so involved in SOAR and for your continued dedication to training your staff! You guys ROCK!

Mental Health Quote

"Happiness can be found even in the darkest of times, if one only remembers to turn on the light."
- Albus Dumbledore-Harry Potter

Social Security Updates

Social Security Benefits to Increase in 2019

Each year SSA announces the annual cost-of-living adjustment (COLA). Usually there is an increase in the Social Security and Supplemental Security Income (SSI) benefit amount people receive each month, starting the following January. By law, federal benefits increase when the cost of living rises, as measured by the Department of Labor's Consumer Price Index for Urban Wage Earners and Clerical Workers. This means that when prices for goods and services we purchase become more expensive, on average, the COLA increases monthly benefit levels and helps you keep up with the changing cost of living.

As a result, more than 67 million Americans will see a 2.8 percent increase in their Social Security and SSI benefits in 2019.

January 2019 marks other changes that will happen based on the increase in the national average wage index. Want to know your new benefit amount as soon as possible? In December 2018, SSA will post Social Security COLA notices online for retirement, survivors, and disability beneficiaries who have a [mySocialSecurity](#) accounts. You will be able to view and save these COLA notices securely via the Message Center inside [mySocialSecurity](#). This year, you will also still receive your COLA notice by mail. In the future, you will be able to choose whether you receive your notice online instead of on paper. Online notices are not available to representative payees.

-SSA.gov

Overview of Clark County's SOAR Program

Clark County SOAR webpage

- csnw.org/soar
- Website designed to allow easy access to the step-by-step packets, which guide SOAR advocates through the application process
- Access to current applications/forms

The screenshot shows the CSNW website header with navigation links: HOME, MOBILE CRISIS (AMCI), ABOUT, SERVICES, HOW TO HELP, CONTACT. Below the header, there is a paragraph describing the SOAR program: "SOAR (SSI/SSDI Outreach, Access, and Recovery) is a national project funded by the Substance Abuse and Mental Health Services Administration. It is designed to increase access to SSI/SSDI for eligible adults who are homeless or at risk of homelessness and have a mental illness and/or a co-occurring substance use disorder." Below this is a section titled "RESOURCES FOR TRAINED SOAR ADVOCATES" with a link to "http://soarworks.prainc.com". The main content area lists four packets, each with a "CLICK HERE" button: Packet One, Packet Two, Packet Three, and Packet Four. At the bottom, there is a contact information section: "Questions regarding SOAR advocate resources? Contact Suzanne Straub 360-449-2557".

Overview of Clark County's SOAR Program

- SOAR Collaboration Meetings
 - Meetings are bi-monthly.
 - New training topic each meeting.
 - Once a year presentations from Social Security Administration and Disability Determination Services staff.
 - Department of Social & Health Services-SSI Facilitator attends.
 - Opportunity for SOAR advocates to ask questions, group problem solve, and share successes.

SOAR Provider Experience with Getting Started!

Katie Lundy

SOAR Benefits Specialist

Visting Nurse Association/Community Services

Abington, Pennsylvania

February 21, 2019



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Steps To Getting Started With SOAR Applications

- Build relationships with community partners.
- Develop a referral process. (See SOAR Tools)
- Remember that we have all once been new to SOAR.
- Lean on seasoned SOAR staff for support, e.g.)
 - Your SOAR Technical Assistance Center Liaison, and
 - SOAR specialists in your area.

Tips, Tricks, & Tools

- Find out what works for you and your SSA field office.
- Utilize resources available through the SAMHSA SOAR TA Center.
- Enroll and utilize SSA's Electronic Records Express (ERE) submission service.
- Ask your SOAR TA Center liaison to review your first few MSRs for feedback.
- Self- Care!
- Practice Makes Perfect!!

Tool: MSR Interview Guide and Template

- Tool for gathering information needed to write the MSR
- Open-ended questions
- Questions about functional limitations
- Context of questions – SGA
- Distinguish between access and ability
- Use the MSR Template to organize and write the MSR



Medical Summary Report

Interview Guide and Template

For applications filed on or after January 17, 2017

The **Medical Summary Report (MSR) Interview Guide** provides sample questions and guidance for gathering information necessary to the SSI/SSDI disability determination process. We do not expect you to ask all of the questions in each section. The questions are intended to help you gather all of the information you will need to write a Medical Summary Report. For example, if the individual has not been in military service, there is no need to include a military history section. Likewise, if the individual has no legal issues, do not include a legal history section.

Using this guidance, SOAR-trained providers are able to gather a thorough history in a respectful manner, which in turn helps the Disability Determination Services (DDS) understand the duration of a person's impairment and the effect of their illness(es) on work ability and functioning. The **MSR Template** may be used to compile information in the form of a narrative letter to SSA/DDS as part of the SOAR process. The template has eight main sections, covering the types of information that DDS needs to make a decision. Use the headings provided in the template to organize your MSR.

Oh, the support you will receive!

SOAR TA Center Activities and Support



SOAR Online Course



SOAR Leadership Academy



SOAR Online Application Tracking (OAT) Program



SOARWorks Library



SOAR Voices Blog



SOARing Over Lunch



SOAR eNews



Bi-Monthly Webinars

SOARing Over Lunch Calls

Monthly calls designed to help support SOAR efforts across the country!

Next Call: May 15th from 1p-2pET

Call/Log-in Information:

<http://prainc.adobeconnect.com/soaringoverlunch/>

Conference Phone: 1-866-805-9853

Conference Code: 3195472964

Additional Resources

- SOAR Works Website and Online Course: <https://soarworks.prainc.com/>
- SOAR Outcomes Tracking: <https://soartrack.prainc.com/>
- SSA Disability Information: <https://www.ssa.gov/benefits/disability/>
- SSA Employment Supports: <https://choosework.ssa.gov/>

Next Steps

- ✓ Learn more about SOAR
- ✓ Get in touch with your SAMHSA SOAR TA Center liaison
- ✓ Reach out to your local or state SOAR leads
- ✓ Register for the SOAR Online Course

Please type your questions into the Q&A box on the right of your screen

Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

<https://soarworks.prainc.com>

soar@prainc.com

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) • 1-800-487-4889 (TDD)