



# What's Working: Using Social Security Disability Benefits to Increase Income and Housing Stability for Veterans

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*Presented at:*

The National Coalition for Homeless Veterans  
Annual Conference

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# SOAR Technical Assistance Initiative

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- SOAR – SSI/SSDI Outreach, Access & Recovery
- Focuses on people who are experiencing or at risk of homelessness
- SOAR is a model for assisting individuals to apply for Social Security disability benefits
- Sponsored by the Substance Abuse & Mental Health Services Administration (SAMHSA) in collaboration with SSA since 2005
- SOAR is active in all 50 states; no direct funding is provided to states
- SOAR TA Center helps states and communities by providing technical assistance and training

# Changing Lives Since 2005

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- 22,810 persons experiencing or at risk for homelessness have been approved on initial application
- 65% approval rate overall, in an average of 90 days in 2014
  - Top 10 SOAR states have average approval rate of 82%
- Compares to 10-15 percent for unassisted applications from people who are homeless and 29 percent for all applicants
- Appeals can take a year or more; many people give up and do not appeal

# What is the need?

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- The January 2014 point-in-time count identified almost 50,000 homeless Veterans
  - SOAR can also serve those who are at-risk for homelessness, or who recently entered permanent housing without income
- Half of Veterans experiencing homelessness have severe mental illness and over half have other health issues
- High prevalence of traumatic brain injury (TBI), post-traumatic stress disorder (PTSD), and sexual trauma among homeless Veterans contributes to difficulty in maintaining employment and housing

# Importance of SSI/SSDI for Veterans

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- SSA disability benefits can provide access to:
  - Income – Veterans can receive SSI/SSDI in conjunction with, or as an alternative to, VA disability benefits
  - Health insurance – Veterans can use the Medicaid and Medicare health benefits that comes with SSI/SSDI to supplement VA health services
- For Veterans with disabilities, SSI/SSDI can increase income & housing stability, and reduce their future risk of homelessness
- Opportunity for staff serving Veterans to help with both SSA and VA disability benefits

# Definition of Disability

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- The definition of disability and application process is different for VA and SSA benefits
  - Discharge status is not a factor in SSI/SSDI determination
  - Disabling condition does not need to be related to military service
  - Those denied for VA benefits may still be eligible for SSI/SSDI
  - Veterans can access SSA benefits while they are waiting for VA benefits
  - There is no partial disability with Social Security

# SSA Definition of Disability

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- For SSI/SSDI, the Veteran needs to show:
  - Evidence of a physical or mental health condition, which results in functional impairments that limits his/her ability to work at a substantial gainful level (quantified as \$1090/month in 2015)
  - That the disabling condition has lasted, or is expected to last, for 12 months or end in death
- Why is the applicant unable to work?

# SSA Fast Track Programs

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## 100% Permanent and Total Veterans Initiative

- Expedites SSI/SSDI applications from Veterans who have 100% P&T rating from the VA
- Does not guarantee SSI/SSDI approval

## Wounded Warriors

- Veterans who received disabling mental or physical health injuries while on active duty on or after October 1, 2001
- The injury does not need to have occurred during combat operations



# Justice-Involved Veterans

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BEST PRACTICES FROM THE SOAR TA CENTER

# Myth Buster

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Justice Involved Persons can apply for benefits!

- ✓ With active warrants
- ✓ While currently incarcerated (minimum of 30 days prior to release)
- ✓ On probation or parole

# What Happens to Benefits for Justice Involved Persons?

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- Social Security Administration (SSA) regulates the receipt of disability benefits while a person is incarcerated in a penal institution
- The rules are different for both SSI and SSDI beneficiaries

## For SSI

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- Incarcerated for a full calendar month, benefits are suspended
- Released in less than 12 calendar month, benefits can be reinstated upon release
- If an SSI recipient is incarcerated for 12 consecutive calendar months their SSI benefits are terminated and they must reapply
- Reapplication can be made 30 days prior to their expected release date but benefits cannot begin until release

## For SSDI

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- Recipients are eligible to continue receiving their benefits until they are *convicted* of a criminal offense *and* confined to a penal institution for more than 30 continuous days. After that time, their benefits are suspended.
- Benefits are reinstated the month following their release into the community

# Opportunities for SOAR and Justice-Involved Veterans

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- Veterans Courts
- Re-entry Programs
- Stand Down Events

# SOAR and VA Homeless Programs

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LESSONS LEARNED FROM SOAR AND HUD-VASH, H-PACT, AND SSVF

# VA Memorandum October 2013

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- Staff are encouraged to participate in SOAR training and assist with SSI/SSDI applications
- VA federal staff may:
  - Disclose VA records to SSA if Veteran signs an SSA release (SSA-827)
  - Assist in gathering documentation
  - Complete the SSI/SSDI application forms
  - Be listed as a contact who knows the Veteran
  - Refer the Veteran to a SOAR representative, if needed
- May not serve as Authorized Representative (SSA-1696) or Representative Payee (SSA-11)



# VA and SOAR Pilot

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- Launched October 2014
- Four pilot sites selected: Chicago, Long Beach, Portland, Seattle
- Utilize SOAR with Veterans in HUD-VASH and H-PACT
  - Some pilot sites will only implement using HUD-VASH
  - Focus on connecting Veterans with disabling conditions and zero/low income with SSA disability benefits to increase housing stability
- One year pilot with on-going technical assistance from the SOAR TA Center and VA Homeless Programs Office

# VA and SOAR Pilot: Preliminary Lessons Learned

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1. **Facilitated guidance through the SOAR Online Course** led to a 100% pass rate for participants on their first attempt through the course
2. **Technical assistance in establishing connections between VA staff and community partners** for both 1696 representation and understanding local SOAR processes facilitated strong collaborations
3. Once infrastructure was in place, participants quickly began assessing Veterans and working on applications, indicating the **potential for rapid scale up**

# VA and SOAR Pilot: Preliminary Lessons Learned

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4. Chicago reports that **great collaboration amongst the different homeless program teams** (H-PACT, case managers, psychiatric nurse practitioners, primary care physicians, and neuropsychologists) is a critical part of their success
5. Those participants who were able to **dedicate staff time to SOAR** were able to successfully complete the SOAR Online Course and begin applications

# SSVF and SOAR

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- Services include increasing access to mainstream benefits
  - Embraced SOAR as an efficient method for obtaining SSI/SSDI
  - Notice of funding includes the expectation that grantees will use the SOAR program through community linkages or staff training
- Over half of the SSVF grantees are actively using SOAR to help Veterans access SSA disability benefits
  - Almost 70 grantees dedicate staff time to using SOAR (Aug 2014)
  - Many grantees have amended their budgets to support a dedicated SOAR benefits specialist

# SSVF and SOAR: What's Working in Atlanta

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MARY CLARK, UNITED WAY OF GREATER ATLANTA

# United Way of Greater Atlanta (UWGA) Supportive Services for Veteran Families (SSVF)

- ▶ 2<sup>nd</sup> year as an SSVF grantee
- ▶ Currently serving 261 veteran households, assisting with rapid re-housing and prevention services in 8 counties of the Greater Atlanta area
- ▶ Housed a total of 362 homeless veteran households as of May 2015

# UWGA-SSVF and SOAR

- ▶ Benefits of SOAR
  - ▶ Improves housing outcomes
  - ▶ Expedites SSI/SSDI process
  - ▶ Reduces the amount of SSVF funds used
- ▶ SOAR certified staff and SOAR Local Lead
  - ▶ Non-certified staff given SSI/SSDI and SOAR Basics training
- ▶ SSVF funds reallocated for SOAR applications
  - ▶ Contracts with First Step Benefits, a nonprofit social enterprise specializing in SSI/SSDI applications using the SOAR process

# Success Story

- ▶ Collaboration
- ▶ Recovery
- ▶ Income
- ▶ Housing
- ▶ Other services



# What's Next

- ▶ Build community collaborations
  - ▶ SSVF Providers
  - ▶ Atlanta VA
  - ▶ Community agencies
  - ▶ Hospitals and Public healthcare providers
  - ▶ DAS
  - ▶ SSA
- ▶ Organize a local steering committee
  - ▶ Establish local SOAR process

# What's Next?

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USING SOAR IN YOUR COMMUNITY

# Incorporate SOAR into Your Services

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- ✓ Gather more information:
  - Issue Brief: *Connecting Veterans to Social Security Disability Benefits: A Key Component in Ending Veteran Homelessness*
  - Reach out to the SOAR TA Center with questions and to help you plan how to use SOAR
- ✓ Explore options for SOAR training with your staff
  - Free online SOAR training, available at: <http://soarworks.prainc.com>
- ✓ Collaborate with community partners to refer Veterans to local SOAR initiatives

# Contact information

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