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

Presented at:
The National Coalition for Homeless Veterans Annual Conference
May 2015
SOAR Technical Assistance Initiative

- 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

- 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?

- 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

- 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 come 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

- 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

- 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

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

BEST PRACTICES FROM THE SOAR TA CENTER
Myth Buster

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?

- 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

- Incarcerated for a full calendar month, benefits are suspended.
- Released in less than 12 calendar months, 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.
- Reapprication can be made 30 days prior to their expected release date, but benefits cannot begin until release.
For SSDI

- 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

- Veterans Courts
- Re-entry Programs
- Stand Down Events
SOAR and VA Homeless Programs

LESSONS LEARNED FROM SOAR AND HUD-VASH, H-PACT, AND SSVF
VA Memorandum October 2013

- 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

- 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

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

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

- 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

MARY CLARK, UNITED WAY OF GREATER ATLANTA
United Way of Greater Atlanta (UWGA)  
Supportive Services for Veteran Families (SSVF)

- 2nd 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?

USING SOAR IN YOUR COMMUNITY
Incorporate SOAR into Your Services

✓ 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](http://soarworks.prainc.com)

✓ Collaborate with community partners to refer Veterans to local SOAR initiatives
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