



Connecting Veterans to Social Security Administration Benefits

SOAR

SSI/SSDI Outreach, Access, and Recovery

SOAR Technical Assistance Initiative

- SOAR stands for SSI/SSDI Outreach, Access and Recovery
- Focus is on people who are homeless or at risk for homelessness
- Sponsored by the Substance Abuse and Mental Health Services Administration (SAMHSA) in collaboration with SSA since 2005
- All 50 states currently participate; no direct funding provided to states
- SOAR TA Center helps States and communities by providing technical assistance and training

SSI and SSDI: The Basics

- SSI: Supplemental Security Income; needs based; federal benefit rate is \$710 per month in 2013; provides Medicaid in most states
- SSDI: Social Security Disability Insurance; amount depends on earnings put into SSA system; Medicare generally provided after 2 years of eligibility
- The disability determination process for both programs is the same

SSA Definition of Disability

- “The inability to engage in any substantial gainful activity (SGA) by reason of any medically determinable physical or mental impairment(s) which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months.”

Use SOAR to Reach Broader Goals



Myths About SSI and SSDI

- ❑ Everybody is denied the first time
- ❑ You will be denied 3 times before you are approved
- ❑ You need an attorney to be approved
- ❑ You can't get benefits if you use alcohol or other drugs
- ❑ If you go to work, you'll lose your health insurance and your benefit check

Veteran Eligibility

- ❑ Veterans who receive a partial disability rating and limited VA benefits may also receive supplemental SSA benefits.
- ❑ Veterans returning from Iraq and Afghanistan can access SSA benefits while they are waiting to receive VA benefits.
- ❑ The health insurance associated with SSA benefits can be very important for those veterans who do not receive free VA health care.

The Problem

- ❑ Only about 10-15 percent of homeless adults are approved on initial application
- ❑ Only about 29 percent of **all** applicants are approved on initial application
- ❑ Appeals can take a year or longer
- ❑ Many people give up and do not appeal

What We Know Is Possible

- As of June 2012:
 - More than 15,000 individuals were approved for SSI/SSDI on initial application
 - **66 percent** approval rate
 - In an average of **98 days**
- SSI/SSDI brought nearly **\$142 million** into state and local economies
- 14 states report Medicaid reimbursement totaling \$7.0 million since 2010 -- an average of **\$9,093** per approved application
- Eight states report public assistance reimbursement by SSA totaling \$1.0 million -- an average of **\$2,362** per approved application

Uses SAMHSA's *Stepping Stones to Recovery* Training Curriculum

- Based on success of University of Maryland Medical System SSI Outreach Project in Baltimore
- Achieved 96% approval rate for those assessed to be likely eligible
- Comprehensive approach to individual's needs with income as the "hook"
- Engagement, relationship, and assessment are integral parts of project and curriculum

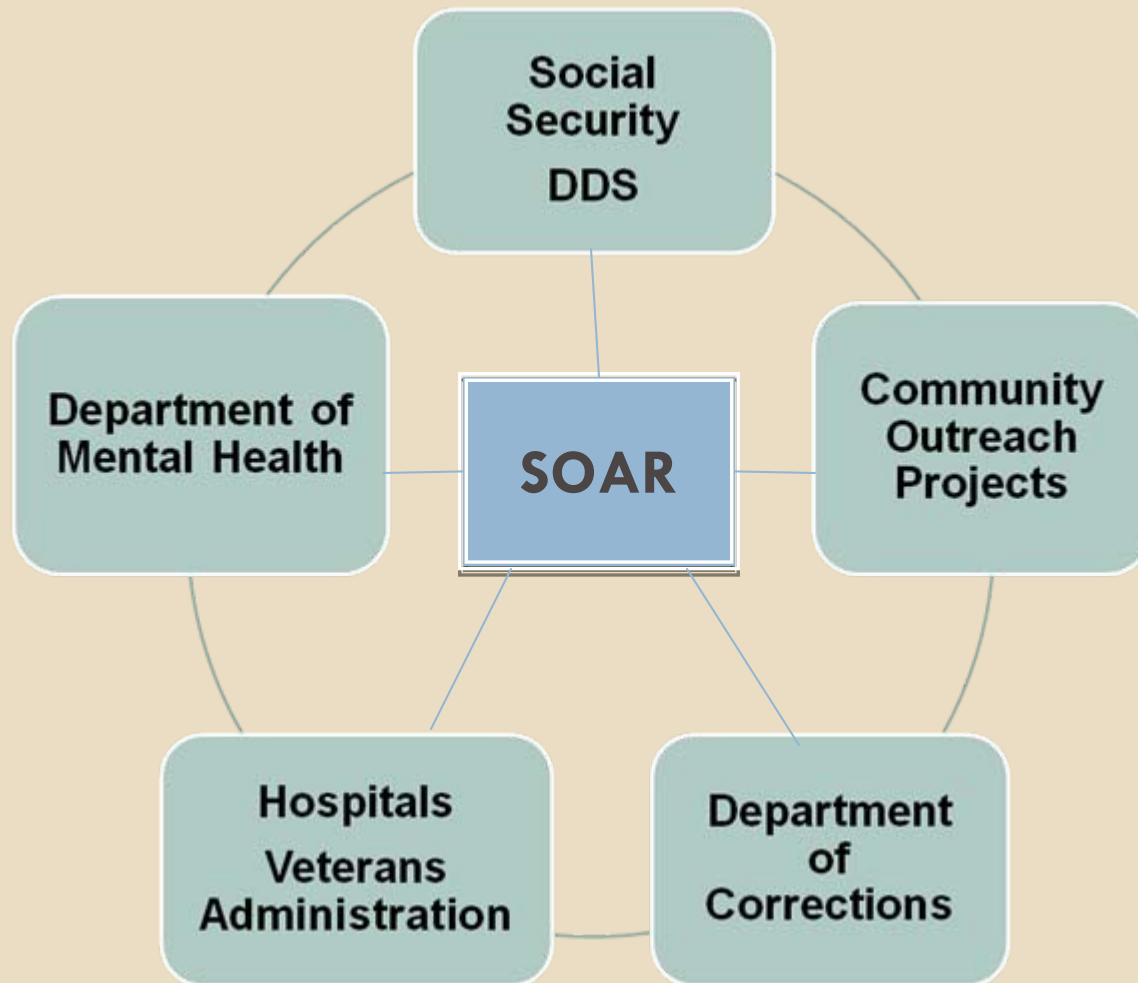
How Is This Model Different?

- Case managers actively assist applicants and develop evidence
- Focuses on the initial application – “Get it right the first time!”
- Avoids appeals and consultative exams whenever possible
- Focuses on documenting the disability

Critical Components for Success

1. Staff trained & available to assist with applications
2. Maintain contact with applicant
3. Become applicant's representative
4. Obtain medical records & write summary report
5. Collaborate with physicians for needed assessments
6. Electronic submission of information
7. Collaborate with DDS and SSA
8. Ensure quality of applications
9. Arrange for representative payees
10. Track and report outcomes

Building Community Collaborations



Making This Happen in Your Community...

Reallocate existing resources. Try it on a small scale.

- ▣ Being able to get people on SSI and/or SSDI and Medicaid in 90 days or less frees up resources to assist others
- ▣ Use Social Work interns or apply for AmeriCorps State or VISTA members
- ▣ Partner with PATH programs

Making This Happen in Your Community...

Successful states and communities:

- ▣ Form steering groups (including SSA and DDS) that meet regularly to address challenges
- ▣ Provide ongoing support to case managers assisting with applications so that communication and quality are enhanced (e.g., refresher trainings, quality review, support group meetings)
- ▣ Use outcomes to argue for additional resources



HOPE SAN DIEGO



Liliana German

St. Vincent de Paul Village

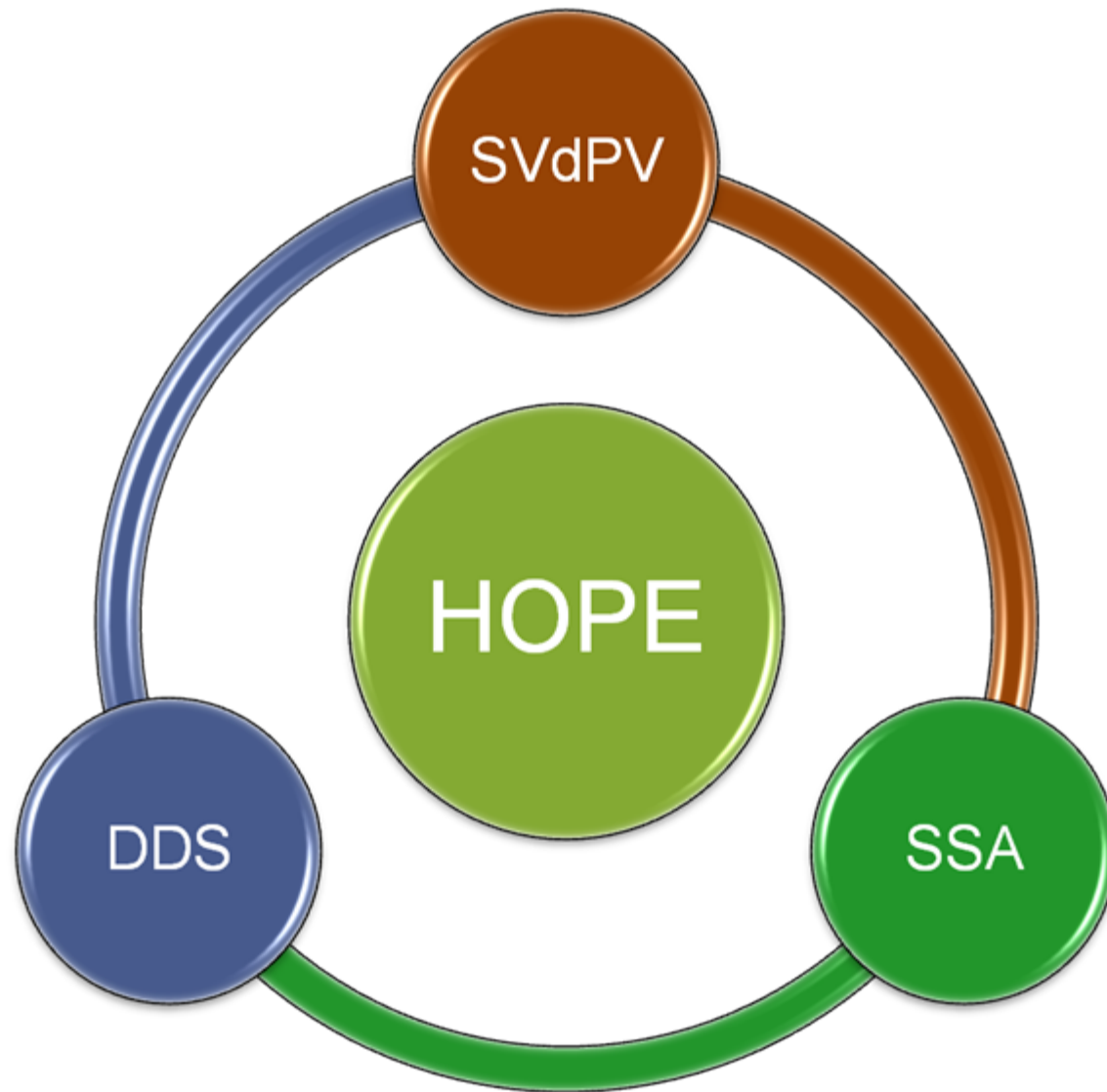
Background

- St. Vincent de Paul Village trained in SOAR in 2009
- Decided to implement internally before training community
- Met with local SSA office and DDS
- Piloted first application in Nov. 2010
- Very successful in our transitional housing programs

Adjusted Process Locally

- Collaboration with SSA and DDS is KEY!
 - Adjusted timelines to meet the needs of our local partners
 - Created new MSR based on feedback from our local DDS office
- Used SSA's Electronic Records Express website to submit medical records
- 2011 felt that we had a product that could be replicated in other agencies

Our Model- Collaboration



Our Mission:

Limited funding

Trained internal staff

Prioritized benefits

Community Initiative

- SVdPV partnered with Corporation for Supportive Housing
- Discussed expansion with SSA and DDS
- Initial stakeholder meeting
 - Branded initiative with local name
 - Discussed process and asked for agencies who had capacity and interest
- Followed up with interested stakeholders

Implementing Initiative

- Created capacity thresholds to use HOPE SD
- Divided interested agencies into different levels of readiness
- Created letterhead for “Approved” agencies that would be easily recognizable for SSA and DDS
- Trained agency administrators on implementing process in their programs
- Provided one-day training to staff on the HOPE process and how it fit into our program.

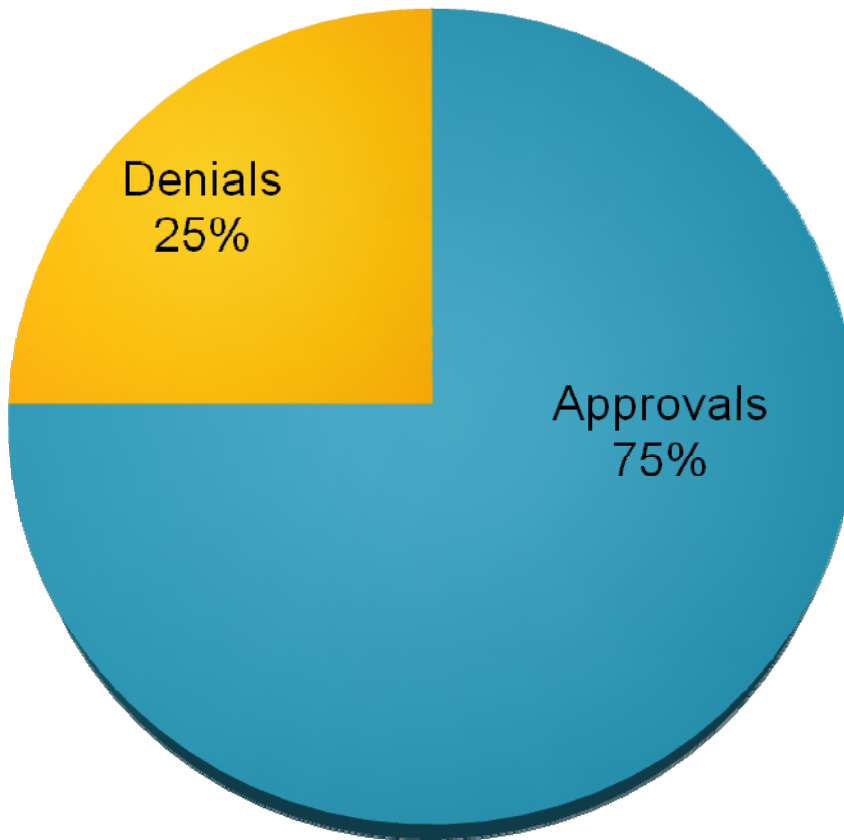
Implementation Group

- Monthly meeting with providers, SSA, and DDS during implementation phase
- Troubleshoot problems
- Provide additional training
- Make any needed adjustments
- A place for agencies who weren't using it to come and hear more info

Advisory Group

- Composed of social service agencies, SSA, DDS, local hospitals, law enforcement, and legal organizations
- Assist with systems issues
- Spread the word at a different level
- Advocate for any needed change

Impact, March 2012 to Feb 2013



60 total decisions

45 Approvals

- 38 started as HOPE SD

- 37 approved initial decision

- 7 started and flagged as HOPE SD later

Average Decision: 82 days

Partnerships

- SSA and DDS very involved
- Worked with local hospitals and Sheriff's Dept to assist with medical records
 - Expedite, free, and electronic format
- Working with Legal Aid Society of SD to assist with hearings if needed
- Community Clinics
 - Training for medical providers

Next Steps

- Expanded to North County San Diego and Indio
- Working with level two agencies to increase capacity and/or build partnerships
- Further work with community clinics
- Submitting HOPE applications for children
- Impact how medical records are documented
 - Creating training curriculum for doctors using DDS feedback and examples from SVdPV clinic
 - Webinar provided by DDS doctors in May 2013

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