



Using SOAR to Connect Veterans to Social Security Benefits

SSI/SSDI OUTREACH, ACCESS, AND RECOVERY
SAMHSA SOAR TECHNICAL ASSISTANCE CENTER

Sponsored by:
Substance Abuse and Mental Health Services Administration
U.S. Department of Health and Human Services

National Coalition for Homeless Veterans Conference, May 2014

Agenda

- What is SOAR?
- Differences in definitions – Social Security vs. VA disability benefits
- Social Security fast track programs for Veterans
- How Social Security and VA benefits impact one another
- Incorporate SOAR into your program

SOAR

- 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

SSI & SSDI: The Basics

- SSA: Social Security Administration
- DDS: Disability Determination Services
- SSI: Supplemental Security Income; needs based; federal benefit rate is \$721 per month in 2014; 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

Changing Lives Since 2005

- 18,986 persons experiencing or at risk for homelessness have been approved on initial application
- 65 percent approval rate overall
- Compares to 10-15 percent for unassisted applications from people who are homeless and 29 percent for all applicants
- Approvals were received in an average of 107 days in 2013
- Appeals can take a year or more; many people give up and do not appeal

Top Eight States

- Served more than 4,000 persons
- 89 percent approval rate on initial applications
- Approval rates are highest in places where more SOAR critical components are implemented

The SOAR Model

- Establish a process for filing SSI/SSDI applications with Social Security
- Case managers actively assist applicants and develop evidence
- Submit a comprehensive and complete SSI/SSDI application
 - ▣ Reduces Consultative Exams and appeals
- In-person or online training on how to document disability

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

- “The inability to:
 - engage in any substantial gainful activity (SGA)
 - \$1,070/month in 2014
 - 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.”
- Why is the applicant unable to work?

Functional Information

- For mental illnesses, the applicant must demonstrate functional impairments that meet the Listings (DDS Blue Book)
- Must demonstrate marked functional impairments in at least two areas
 - Activities of daily living
 - Social functioning
 - Concentration, persistence and pace
 - Repeated episodes of decompensation

Functional Information

- For physical impairments, the application must demonstrate significant limitations in meeting physical, mental, sensory and other requirements of work
- A limited ability to perform certain physical demands of work activity (e.g. sitting, standing, walking, lifting, carrying, etc.) may reduce a person's ability to do past work and other work

SSA Fast Track Programs

100% Permanent and Total Veterans Initiative

- Began March 2014
- Expedites SSI/SSDI applications from Veterans who have 100% P&T rating from the VA
 - ▣ Does not guarantee SSI/SSDI approval
- Veterans should identify themselves as a “Veteran rated 100% P&T” when initiating the SSI/SSDI application, and should provide the VA rating notification letter to SSA.

SSA Fast Track Programs

Wounded Warriors

- Veterans who received disabling mental or physical health injuries while on active duty on or after October 1, 2001, regardless if the injury occurred in the U.S. or in combat.
- When initiating the SSI/SSDI application, Veterans should inform SSA that their injury occurred while on active duty.

SSA & VA Benefits: Impact On Healthcare

- SSI and SSDI come with Medicaid and Medicare
- Assists those without access to VA healthcare services
- Veterans who qualify for VA healthcare can use Medicaid or Medicare to pay for services not covered by the VA
 - ▣ Helps Veterans located in areas that have limited access to VA facilities

SSA & VA Benefits: Impact On Cash Benefits

- SSI – Supplemental Security Income
 - ▣ Needs based program, so VA benefits will affect SSI cash amount
 - ▣ VA benefits = “unearned income” since it does not come from paid employment. As such, it will be deducted dollar for dollar from the SSI federal payment amount, after a general exclusion of \$20.

SSA & VA Benefits: Impact On Cash Benefits

□ SSI – Supplemental Security Income

VA Monthly Disability Benefit Amount	\$400
General Exclusion	- \$20
Counted Income	= \$380
Maximum Monthly SSI Benefit Amount (2014 rates)	\$721
Counted Income	- \$380
Monthly SSI Amount	= \$341
Total Monthly Income (VA + SSI benefit amounts)	\$741

- Comes out ahead – adds cash benefit and health coverage

SSA & VA Benefits: Impact On Cash Benefits

- SSDI – Social Security Disability Insurance
 - SSDI benefits are not affected by unearned income through VA benefits.
 - Paid into the system through work activity and became “insured”

VA Monthly Disability Benefit Amount	\$400
SSDI Monthly Benefit Amount	+ \$850
Total Monthly Income	= \$1250

Incorporate SOAR into Your Program

- Supportive Services for Veteran Families (SSVF)
 - Grantees encouraged to have trained SOAR case workers
- Increases housing stability for Veterans using HUD-VASH vouchers
- Homeless Veterans Reintegration Program (HVRP)
 - SOAR issue brief on Employment and Social Security Work Incentives
- Partner with VA Medical Centers and social work staff

VA Memorandum October 2013

- Staff are encouraged to participate in SOAR training and assist with SSI/SSDI applications
- May disclose VA records to SSA if Veteran signs the appropriate release (SSA Form 827)
- Can assist in gathering documentation, completing the SSI/SSDI application forms, and referring the Veteran to a SOAR representative, if needed
- May not serve as Authorized Representative (SSA Form 1696) or Representative Payee (SSA Form 11)
- Can be listed as a contact who knows the Veteran

SOAR Online Training

<http://soarworks.prainc.com/>

- Free, web-based course to train case managers in completing SSI/SSDI applications using SOAR
- Standardized, self-paced training
- Includes completion of a practice SSI/SSDI application
- Individualized feedback from the SOAR TA Center
- 16 CEUs from NASW
- Class 1 of the course provides a SOAR 101

<http://soarworks.prainc.com/>



SEARCH

SOAR In Your State

Online Course

Application
Toolbox

Library

Ask a Question

Increase SSI/SSDI Approval Rates

1
2
3



UPDATES

SOAR Article in Psychiatric News

What Is SOAR?

Contact Us

Join Listserv

Welcome

SAMHSA's SSI/SSDI Outreach, Access, and Recovery Technical Assistance (SOAR TA) Center is funded by the [Substance Abuse and Mental Health Services Administration \(SAMHSA\)](#). This national project is designed to increase access to the disability income benefit programs administered by the [Social Security Administration \(SSA\)](#) for eligible

SSI/SSDI Outreach, Access and Recovery (SOAR) Online Training



✔ Welcome To The SOAR Online Training

The techniques taught in this online curriculum can improve the quality and completeness of any application for SSI/SSDI. Individuals who complete the course are encouraged to use what they learn to improve SSI/SSDI applications for themselves or others.

However, those who enroll in this course agree that the label "SOAR" will only be used on SSI/SSDI applications for persons who are homeless or at risk for homelessness.

Please click "How Does the Course Work?" below to read some important information before you begin.

[How Does the Course Work?](#)



CLASSES IN THIS COURSE



1. The Need for SOAR



2. Initiating the Application



3. Exploring Basic Eligibility



4. Medical Information



5. The Link to Functioning



6. Completing the Application Packet



7. Supporting Recovery

Key:



Click on the + to view articles in a class



Click on the - to hide articles



You have viewed this article



This is the last article you viewed

Get Involved with SOAR

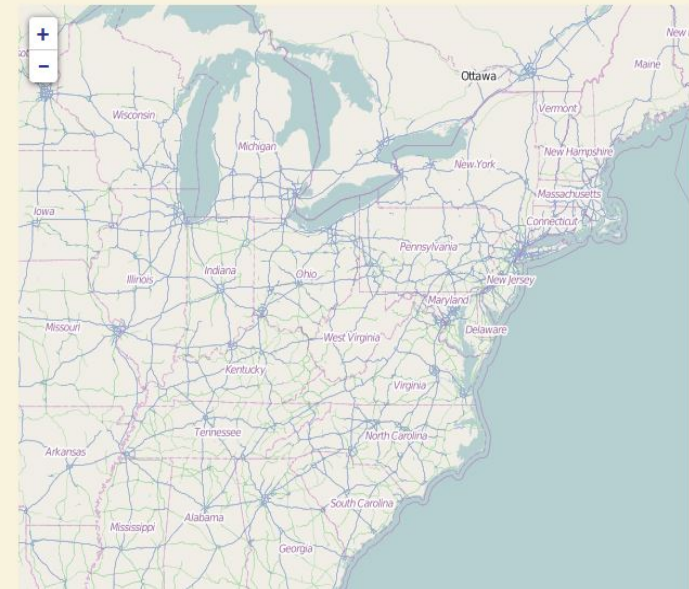
<http://soarworks.prainc.com/directory>

- Find your SOAR TA Center Liaison
- Find your SOAR State Team Lead
- Connect with SOAR in your community
- Problems? Let us know!

SOAR In Your State

Browse by Community

Alabama
Alaska
Arizona
Arkansas
California
Colorado
Connecticut
Delaware
District of Columbia
Florida
Georgia
Hawaii



Conclusion

- SOAR is about ending homelessness, promoting recovery and transforming lives
- SSI/SSDI are major tools in income and housing stability for Veterans
- Additional materials on SOAR and Veterans will be published this summer
- SOAR works!

For More Information

Visit the SOAR website at:

<http://soarworks.prainc.com/>

Jen Elder

Senior Project Associate

SAMHSA's SOAR Technical Assistance Center

Policy Research Associates, Inc.

518-439-7415 x 5256

jelder@prainc.com