

The logo for SOAR (Statewide Online Assessment and Reporting) features the word "SOAR" in a blue, serif font. The letter "S" is stylized with a yellow swoosh that loops around it and extends to the right, ending in a yellow arrowhead pointing towards the right. The background of the slide features a large, light gray, stylized graphic of a person's head and shoulders, facing right, with a yellow swoosh that loops around the "S" in the SOAR logo.

SOAR

# Expediting SSI/SSDI Applications: PATH and SOAR

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August 4, 2011  
Sacramento, CA

# SOAR Is Sponsored By...

Substance Abuse and Mental Health  
Services Administration (SAMHSA)  
U.S. Department of Health and Human  
Services

In collaboration with...  
Social Security Administration

# SOAR...

- Stands for SSI/SSDI Outreach, Access and Recovery
- Is sponsored by SAMHSA; No direct funding to states
- 48 states currently participate
- Helps States and communities increase access to SSI/SSDI through:
  - Collaboration and strategic planning
  - Training
  - Technical assistance

# SSI/SSDI Can Be Critical To:

- Ending homelessness for people with disabilities
- Providing access to needed
  - Housing
  - Treatment
  - Other supports
- Promoting Recovery

# The Problem

- Only about 10-15 percent of adults who are homeless are typically approved on initial application
- Only about 32 percent of **all** applicants are typically approved on initial application
- Appeals can take years; many potentially eligible people give up and do not appeal

# SOAR Outcomes...

- As of June 2010, 37 states reported that:
  - Since 2006, more than **6,500 individuals** had been approved for SSI/SSDI on initial application
  - Average allowance rate is **73 percent**
  - In an average of **91 days**
- In 2010 alone, SSI/SSDI brought at least **\$53 million** into the state and local economies of these states

# How Is This Model Different?

- Staff actively assist applicants
- Step-by-step explanation of SSI application and disability determination process
- Focuses on the initial application – “Get it right the first time!”
- Avoids appeals whenever possible
- Focuses on documenting the disability
- Recovery-oriented, comprehensive

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

- Based on success of University of Maryland Medical System SSI Outreach Project in Baltimore
- Engagement, relationship, and assessment are integral parts of project and curriculum
- Two-day comprehensive training on disability determination process and SOAR critical components
- Tools to expedite applications and improve approval rates

# PATH and SOAR

- SOAR meets one of the four primary goals of outreach – increasing access to income/benefits

# Training and Systems Change

- SOAR is not only about training, it's about changing the system
- Stakeholders collaborate to create and implement new systems and protocols that increase and expedite access to benefits
- Communities focus on implementation of SOAR critical components

# States Combining SOAR and PATH

- Arkansas
- Connecticut
- DC
- Florida
- Georgia
- Indiana
- Kansas
- Louisiana
- Michigan
- Missouri
- Mississippi
- Montana
- New Jersey
- Oklahoma
- South Carolina
- Tennessee
- Virginia
- Wisconsin
- Wyoming

# SOAR In CA Counties & Cities...

- Los Angeles
- San Francisco
- Contra Costa
- Alameda
- Santa Clara
- Sacramento
- Santa Barbara
- Redding
- San Diego
- Others?

# Newly Awarded SOAR TA to California Counties:

- Amador-Tuolumne
- Glenn
- Kings-Tulare
- Madera
- Mendocino
- Monterey

# Roles of PATH in SOAR

- State/County PATH Contact serves as SOAR lead
- SOAR incorporated in contracts with PATH providers
- PATH funding provides dedicated staff for SOAR
- PATH funding used to provide SOAR training to providers
- PATH staff certified as SOAR trainers
- Single point of contact with SSA & DDS
- Reports outcomes of SSI applications

# In Georgia PATH funded...

- A State-level SOAR coordinator
- A SOAR Train-the-Trainer program to disseminate SOAR to localities
- SOAR benefits specialists in localities with large homeless populations
- Training for all PATH providers in the SOAR approach
- On-going TA and leadership
- More than 700 applications processed with 74% approved in 118 days on average

# In Michigan, PATH has...

- Implemented SOAR in all 8 regions of the state
- All PATH programs contractually required to complete SSI/SSDI applications using SOAR
- Outcomes are tracked using HMIS
- AmeriCorp/VISTA provides state level coordination of SOAR
- More than 2,000 applications have been processed with a 67% approval rate in 90 days

# Successful Models: North Carolina

- In 2 years **77%** of applications were **approved** in an average of **109 days**
- **Dedicated Benefits Specialists:**
  - **Mecklenburg:** 3 FTE dedicated to SOAR, SOAR Workgroup that meets regularly
  - **Asheville/Buncombe:** 2 FTE dedicated to SOAR; heads local SOAR caseworker group
  - **Winston-Salem/Forsyth:** 2 FTE dedicated to SOAR
  - **Durham:** 4 FTE dedicated to SOAR; Disability Workgroup meets regularly
  - **Greenville/Pitt:** DSS dedicating 2 staffers PT to SOAR; 1 FTE with the County
  - **Wilmington/New Hanover:** 1 FTE dedicated to SOAR
  - **Wake:** 1 FTE dedicated to SOAR, SOAR Workgroup that meets regularly
  - **Iredell:** 1 FTE dedicated to SOAR
  - **Cumberland:** 1 FTE dedicated to SOAR
  - **ECBH:** 2 FTE dedicated to SOAR

# Successful Models: Nashville

- Nashville's 10-year plan and PATH funds 3 positions in community mental health center
- Since May 2006, **96% of 233** applications approved in an average of **70 days**
- Works closely with medical records staff of local primary care clinics and hospitals
- Outreach ensures contact with applicants
- Treatment provided in agency where SSI project is housed

# Los Angeles BEST Team

- Funded by DHS
- Started 18 months ago
- 85% allowance rate on 502 applications in an average of 4 months
- Strong outreach component; multidisciplinary team works with psychiatrists and medical records to submit applications

# Successful Models: Corrections

- SSI applications done prior to release from **Sing Sing prison** by a community services agency in NYC
  - Same staff who do applications follow folks in community and access housing for them
  - 90% of 130 pre-release SSI applications approved in average of 86 days
- SOAR implemented in **Miami jail diversion** program
  - 72% of 417 applications approved in average of 75 days
  - **Recidivism declined** 70% to 22% at 12 months after release
  - In 2009, the team demonstrated **\$6,913,248 in savings** to the state of Florida

# Making This Happen in Your Community...

Reallocate existing resources. Try it on a small scale.  
Show success. Make the case for more staff

- Time spent up-front on assessment and benefits acquisition is an effective way to engage people
- Serving people who have income and health insurance makes it easier and quicker to access housing, treatment, and other supports
- Accessing SSI/SSDI and Medicaid/Medicare in 90 days or less frees up resources to assist others

# Ask the SOAR TA Center for Help

- Expand SOAR to new audiences or communities
- Build state, local or regional planning groups
- Improve collaboration with SSA or DDS
- Explore strategies for funding and sustainability
- Build training capacity
- Increase allowance rates & quality of applications

**TA is funded by SAMHSA; No cost to you!**

# For More Information

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