

What is SOAR, and how can it help our community?

SOAR trains caseworkers and clinicians and develops collaborative community process in which SSI/SSDI applications are approved the first time and in less time.

The Importance of Disability Benefits

- ? *For the applicant:* provides income support critical for recovery, assists with access to additional needed services, may facilitate the first step on the path to employment.
- ? *For the case manager:* avoids effort needed to appeal, avoids trying to serve a person with no resources, leads to more successful outcomes for the individual served, creates an increased feeling of success and motivation
- ? *For the agency:* Allows case managers to be more efficient and effective, provides Medicaid reimbursement for health care agencies, covers indirect costs incurred in homeless outreach, helps implement a recovery model
- ? *For community and states:* Reimbursement of State general assistance benefits paid out, provides a Federal Medicaid match, payment for services previously covered by State or local government such as shelters, medical care, ER visits, medications, for the housing authority, payment of rent.

Strategies for Increasing Access to Disability Benefits

Many groups are involved in the application process – collaboration with everyone involved at the start allows strong case preparation that leads to application approval, increasing local community resources and reducing the frustration that is often associated with SSI/SSDI applications.

Who is involved?

- ? Applicant
- ? Case manager/ AmeriCorps*VISTA
- ? Case manager's agency
- ? Physical and Mental Health Providers
- ? Disability determination services
- ? Social Security Administration

Ingredients for Successful Applications:

- ? Adequate Staffing
- ? Training
- ? Focus on the initial application: getting it right the 1st time avoids appeals
- ? Become an applicant's representative
- ? Use of consultative exams (CEs) efficiently (limited use of CE's the goal)
- ? Caseworkers work closely with medical providers
- ? Caseworkers develop medical summary reports that are evaluated and co-signed by a physician or psychologist
- ? Relationships with hospital and clinic medical records departments are established
- ? Relationships with DDS and SSA are established
- ? Outcomes are measured and reported

SOAR is a project of the NC Interagency Council for Coordinating Homeless Programs (ICCHP).

For more information, contact Angie Pittman, Buncombe County DSS (828) 250-5749

or go to: <http://www.prainc.com/SOAR/>

The Necessary Groundwork

- ? *Staffing*: adequate staff with time and resources to devote to SSI is critical. Examples of staffing for SOAR are benefits specialists, homeless or SSI outreach teams, and assertive community treatment teams (ACT)
- ? *Time*: Staff needs sufficient time to interview & assess the applicant, track down medical records, and write a summary report which is then reviewed and co-signed by the applicant's physician.
- ? *Training*: SOAR training is sponsored by the NC Interagency Council for Coordinating Homeless Programs (NC ICCHP). Currently, there are four people certified to train caseworkers. Additionally, there are available trainers for clinicians. Training should:
 - o Emphasize the initial application
 - o Focus on documenting disability to reduce the need for consultative exams
 - o Explain how to develop a medical summary report
 - o Emphasize the importance of, and how to work collaboratively
 - o Include active involvement of DDS and SSA
- ? *Becoming an Applicant's Representative*: Reduces the denials due to difficulties maintaining contact with the applicant, authorizes communication among DDS, SA, and the representative, representative receives copies of all written communication, if application is denied, representatives have access to applicant's file. (Process is simple: file a SSA-1696 Appointment of Representative form.)
- ? *Caseworkers work closely with medical providers*: Community clinicians who know the applicant can make an accurate diagnosis which will ensure that the disability is well documented. Clinicians should understand the disability determination process (through experience and SOAR training). They can help with diagnosis of impairment, providing a longitudinal history, and illustrating the link between impairment and work. Through communication, caseworkers can learn to help clinicians develop medical evidence efficiently and effectively.
- ? *Avoiding Consultative Exams (CEs)*: A CE is required when DDS doesn't have enough information to make a determination. CEs are usually less personal – the physician doesn't know the applicant's history. An in-house system should be created to flag and address missing information before an application is submitted.
- ? *Foster Relationships with Medical Records Departments*: SOAR workers should have relationships with medical records departments. SOAR workers need to be clear about what information is needed, have proper releases, and offer to copy records when possible to reduce the burden on records departments.
- ? *Collaboration & Communication with SSA & DDS*: Staff at these offices can be dedicated to work with applications from the SOAR program and flag applications to expedite them.
- ? *Collect & Report Outcomes*: Simple measures of impact (number of applications filled, number approved, time of approval) can show community the positive impact of SOAR and build collaborative efforts. Example: in San Francisco, for every \$1 of SOAR Outreach, \$6 of Medi-Cal (Medicaid) expenditures were recouped.

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