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- YES, this webinar is being recorded and will be available on our website within 1 week of this presentation.

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Introducing SOAR (SSI/SSDI Outreach, Access, and Recovery) for Children

Presented by the Substance Abuse and Mental Health Services
Administration (SAMHSA)
SOAR Technical Assistance (TA) Center
U.S. Department of Health and Human Services

February 21, 2019



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Substance Abuse and Mental Health
Services Administration

Disclaimer

The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).

Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Questions and Answers

Purpose and Objectives

- Share goals and objectives of the SOAR Online Course for Children
- Learn how SOAR Providers can begin to integrate SOAR for Children into your SOAR initiative
- Outline recommendations for implementing SOAR for Children with your community plans to end family and youth homelessness

Agenda

SOAR Online Course: Child Curriculum and Launching SOAR for Children

- Kristin Lupfer, MSW, Project Director, SAMHSA SOAR TA Center

SOAR in Maryland: A State Lead's Plan of Action

- Caroline Bolas, SOAR State Lead, Behavioral Health Administration, Catonsville, MD

SOAR for Children in Austin: Starting with Me First!

- Suzie Brady, MMT, Travis County SOAR Local Lead, Integral Care, Austin, TX

SOAR Provider Experience with SSI for Children: Julian and Janey

- Laura Kolb, JD, Staff Attorney, Homeless Advocacy Project, Philadelphia, PA

Questions and Answers

- Facilitated by the SAMHSA SOAR TA Center

Welcome!

Robert Grace
Public Health Advisor
Homeless Programs Branch
Center for Mental Health Services
Substance Abuse and Mental Health Services Administration

February 21, 2019



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The SOAR Online Course: Child Curriculum

Kristin Lupfer, MSW

SAMHSA SOAR Project Director

Policy Research Associates, Inc.

Substance Abuse and Mental Health Services Administration

U.S. Department of Health and Human Services

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What is SOAR?



- A model for assisting eligible individuals to apply for Social Security Administration (SSA) disability benefits
- For individuals who are experiencing or at risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities
- Sponsored by SAMHSA in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, DC currently participate

SOAR Timeline

- SOAR training and process originally developed for adult SSI/SSDI applications in 2005
- Child SSI Issue Brief released in 2014
- Discussions about SOAR for Children with the SAMHSA Child, Adolescent, and Family Branch begin in Spring 2017
- SOAR for Children Expert Panel is held in September 2017
- SOAR Online Course: Child Curriculum launched on October 31, 2018

Why SOAR for Children?

- Children and youth experiencing homelessness have higher rates of disability and experience higher rates of mental health problems, developmental delays, and poor cognitive outcomes than their stably housed peers.
- 180,413 people were homeless in 56,342 families with children in 2018.
- There were 36,361 unaccompanied homeless youth under the age of 25 in 2018.
 - Unaccompanied homeless youth are more likely to be unsheltered (51%) than all people experiencing homelessness.

<https://www.hudexchange.info/resources/documents/2018-AHAR-Part-1.pdf>

National Center for Homeless Education, UNC Greensboro (2017). Federal Data Summary School Years 2013-2014 to 2015-2016, Education for Homeless Children and Youth

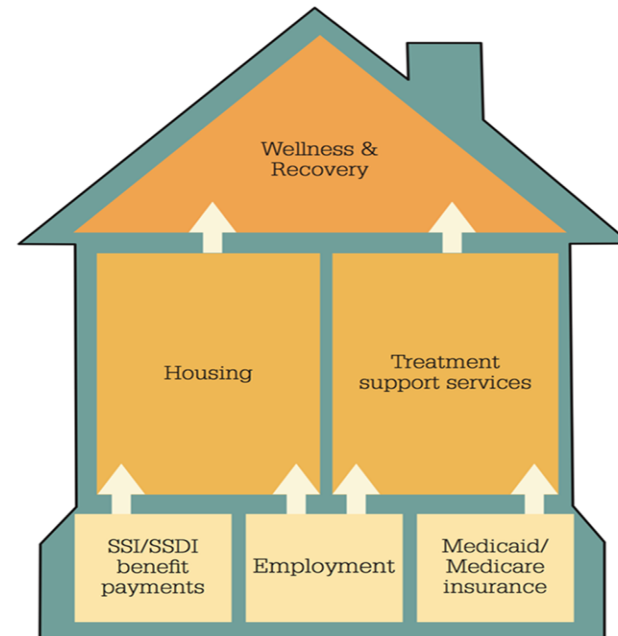
The National Center on Family Homelessness (2011). The Characteristics and Needs of Families Experiencing Homelessness. Retrieved from: <https://files.eric.ed.gov/fulltext/ED535499.pdf>

A Foundation for Resiliency and Recovery

More Than Income

- Access to health care and housing
- Increased education and employment opportunities
- Decrease in institutionalization and hospitalizations

SSI: One Brick in Foundation



SSI for Children: The Basics

Supplemental Security Income (SSI)

- Benefits for low income individuals
 - Financial need is a complete picture of income, living arrangement, and family resources
- Children who are disabled or blind
- Federal benefit rate is \$771/month (2019)*
- Provides Medicaid in most states

**<https://www.ssa.gov/ssi/text-general-ussi.htm>*

SSI Eligibility: Definition of Disability for Children

Mental health or physical condition(s)

- Diagnosis
- Documentation
- Duration

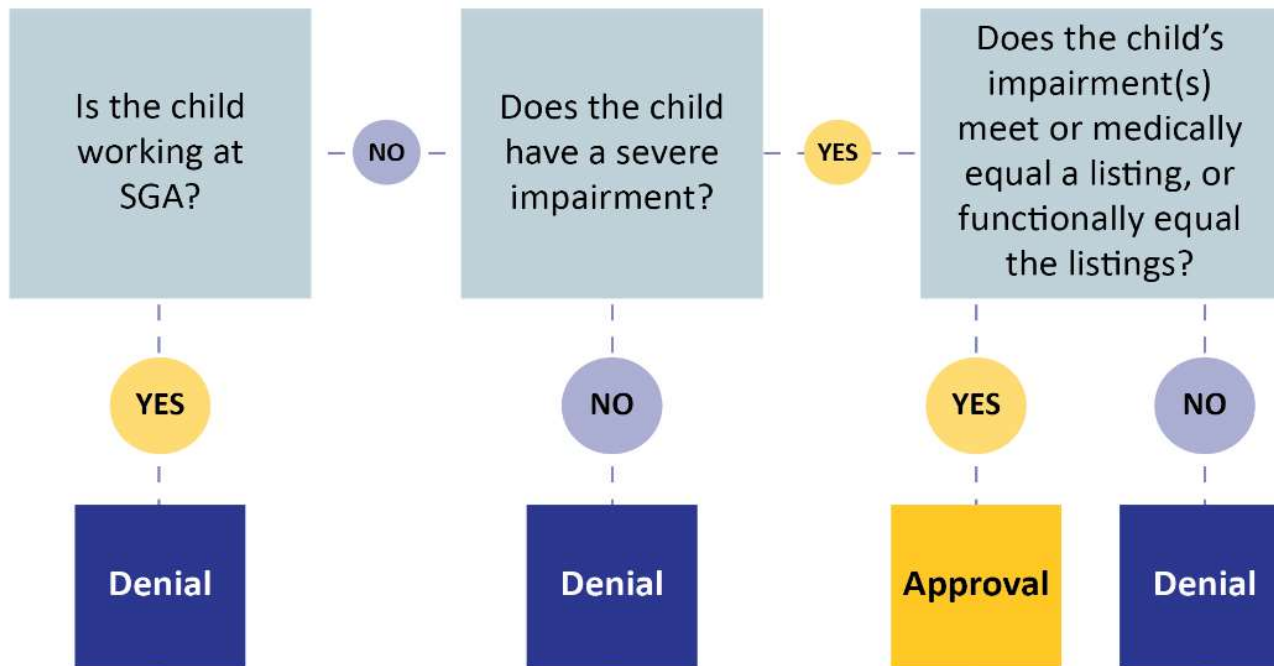


Functional Impairment(s)

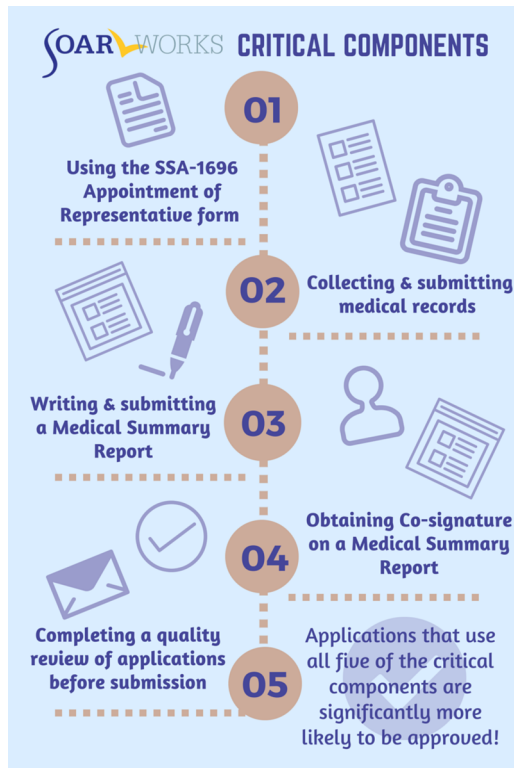
- SSA will determine how the child's functional abilities compare to the functional abilities of a child of the same age who does not have physical or mental impairments.

Sequential Evaluation for Children

The Social Security Administration's Sequential Evaluation for Children



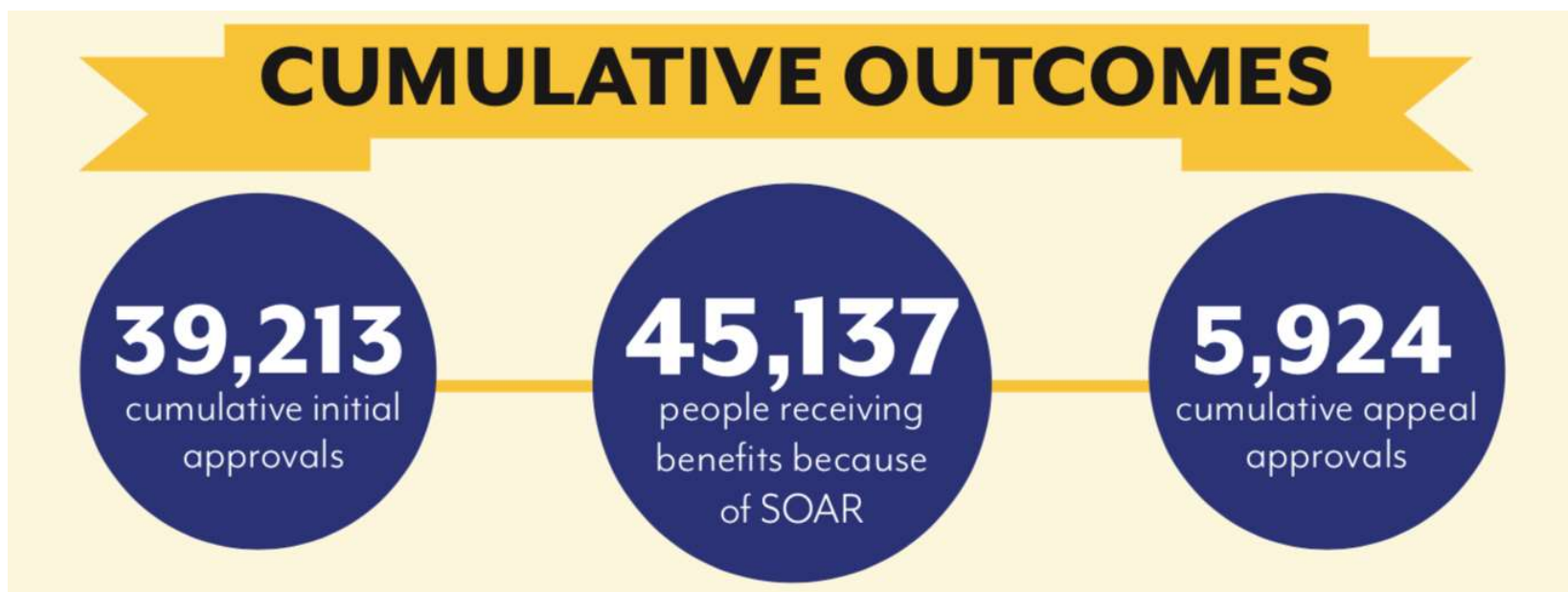
What Makes SOAR Unique?



SOAR-trained case workers are the heroes!



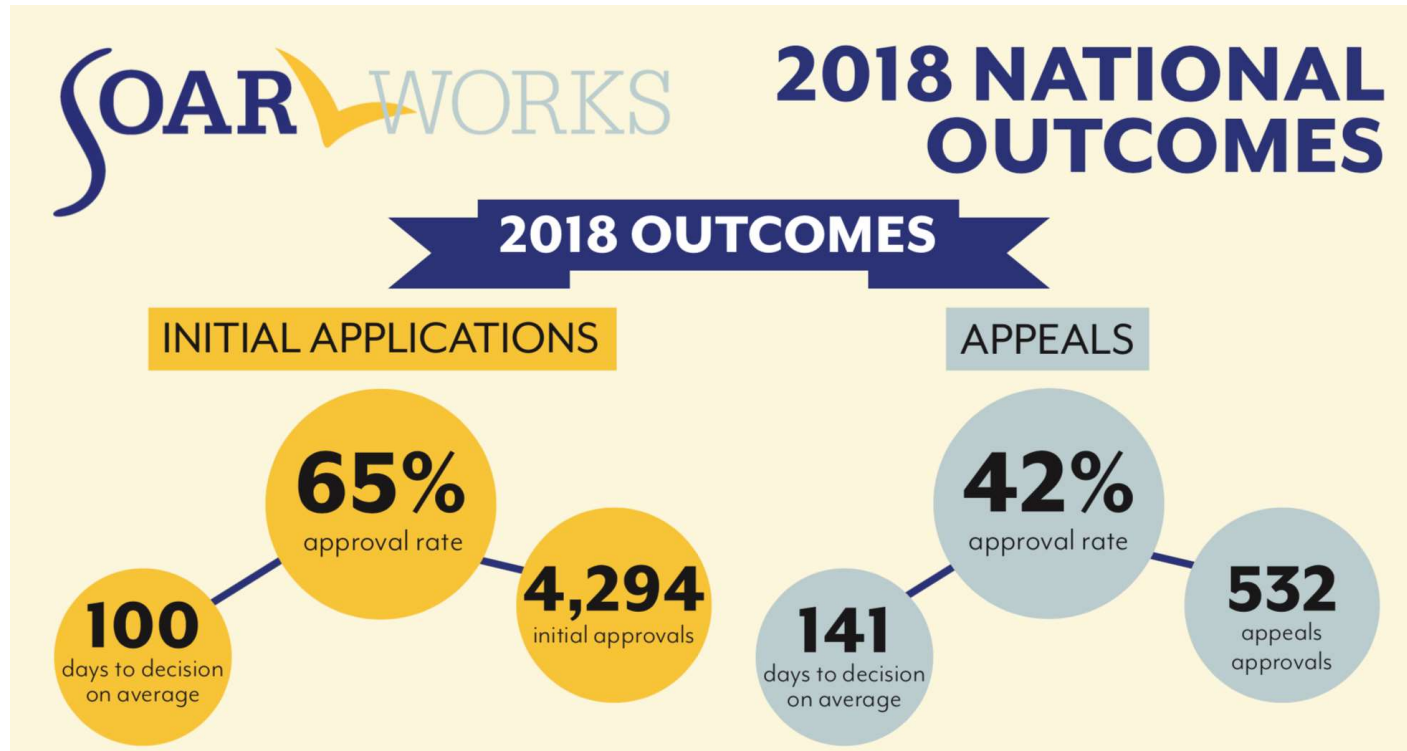
SOAR Works!



*National SOAR outcomes as of June 30, 2018

<https://soarworks.prainc.com/article/soar-outcomes-and-impact>

2018 National Outcomes



*As compared to a 29% approval rate for all SSI/SSDI applicants nationwide

SSI Annual Statistical Report, 2017. Table 70. SSA Pub. No. 13-11827. Washington, D.C.: SSA, September 2018

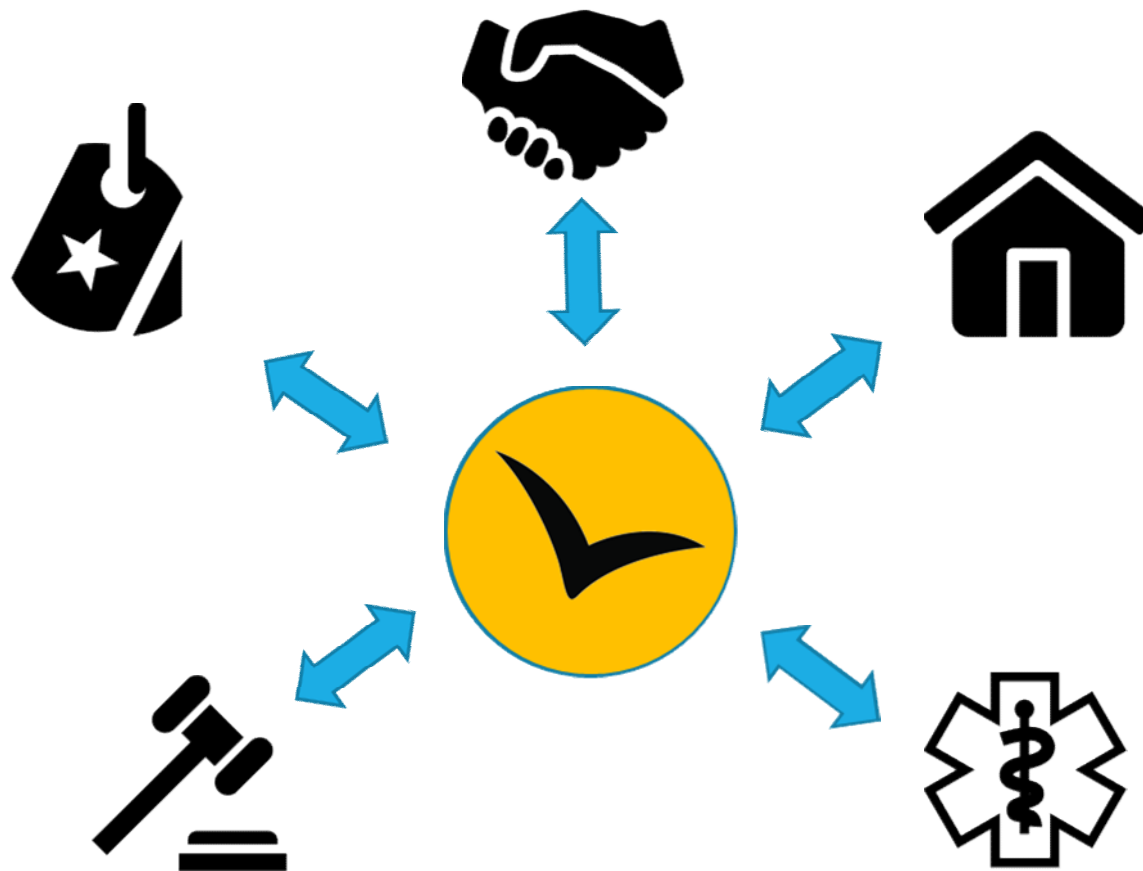
Child SSI Application Outcomes

- Select providers in Arkansas, Florida, Kansas and Nevada have been implementing SOAR with children
- 368 decisions, 72 percent approval rate*
- Average of 106 days to decision



**Outcomes reported in the SOAR Online Application Tracking (OAT) program*

Community Collaboration



SOAR Leadership Structure

SOAR TA Center



- Facilitates strategic planning meetings
- Conducts Leadership Academies, webinars, & learning communities
- Develops resources, including SOARWorks, the SOAR Online Course, and OAT
- Provides TA at all stages of SOAR implementation

State Team Lead



- Facilitates state steering committee
- Directs plans to grow & sustain statewide activities
- Serves as liaison to localities
- Maintains relationships with SSA & DDS
- Submits SOAR outcomes to the TA Center

Local Lead



- Facilitates local steering committee
- Directs local implementation plans
- Facilitates SOAR Online Course cohorts
- Conducts SOAR Fundamentals trainings
- Ensures quality applications & reports outcomes

Case Manager



- Completes high-quality SSI & SSDI applications using the SOAR model
- Communicates with local SSA & DDS representatives
- Tracks application outcomes

*OAT: Online Application Tracking Program

*DDS: Disability Determination Services

*TA: Technical Assistance

Oh, the support you will receive!

SOAR TA Center Activities and Support



SOAR Online Course



SOAR Leadership Academy



SOAR Online Application Tracking (OAT) Program



SOARWorks Library



SOAR Voices Blog



SOARing Over Lunch



SOAR eNews



Bi-Monthly Webinars

Benefits of the SOAR Online Course



SSI/SSDI Outreach, Access, and Recovery (SOAR) Online Course: Child Curriculum

- Standardized training provided across all geographic areas
- SOAR Leaders can coordinate follow-up training and support
- Course is FREE, web-based, and self-guided

SOAR Online Course: Child Curriculum

[Contact Us](#) | [Me](#) | [Log Out](#)

[SOAR in Your State](#) | [Online Course](#) | [SOAR Voices Blog](#) | [OAT & Outcomes](#) | [Library & Tools](#) | [Ask a Question](#)

Current course: SOAR Online Course: Child Curriculum

The Need for SOAR

Key Lessons from SuperSOAR
SOAR is about people, not forms. Success comes from compassion, persistence, and confidence in using SOAR and the tools it offers. You do NOT need to become an expert in SSA regulations or have all the answers.

Key Lessons from SuperSOAR
The SOAR model for completing SSI applications utilizes five critical components that significantly increase the likelihood of an approval for those who are eligible.

Class Overview

The Need for SOAR provides an introduction to the SOAR model, its values, and the roles and responsibilities of key stakeholders, especially case managers.

- Why SOAR is an important tool for case managers to use when assisting children who may be eligible for SSI
- Important community organizations and stakeholders necessary for a successful SOAR effort and the roles they play
- An overview of SSA's disability benefit program for children, SSI
- An introduction to the critical components of the SOAR model
- Key steps in SSA's disability determination process, also known as the Sequential Evaluation
- An overview of key social service systems: child welfare, children's behavioral health, and juvenile justice
- What values inform the SOAR process

[Begin Class](#)

Don't forget to work on your Practice Case at the end of each class.

CLASSES IN THIS COURSE

- 1. The Need for SOAR**
 - Class Home
 - 1. What is SOAR?
 - 2. SSA: What is Disability?
 - 3. Access to the SSA Disability Program: Players, Roles, and Tasks
 - 4. Steps in the SSA Disability Application Process for Children
 - 5. Disability Determination: The SSA Sequential Evaluation
 - 6. The SOAR Model: Critical Components
 - 7. The SOAR Process: Critical Components in Action
 - 8. Definitions of Homelessness
 - 9. Identifying SOAR Applicants for Children's SSI
 - 10. Social Service Systems: Child Welfare, Children's Behavioral Health and Juvenile Justice
 - 11. SOAR Values
 - 12. Try It: Key Concepts of Class 1
 - 13. Class 1 Conclusion
 - Meet Your Client
2. Initiating the Application
3. Exploring Basic Eligibility
4. Medical Information
5. The Link to Functioning
6. Completing the Application Packet
7. Supporting Recovery

Sample SOAR Referral Application: Child

Please complete in full and fax to: [\[Contact Person\]](#) at ____

Child's Name: _____

Date of referral: _____

Referring agency: _____

Referring staff and title: _____

Referral contact number: _____

Referral email address: _____

Child's Identifying Information:

Date of birth: _____

SSN: _____

Medicaid/Medical Insurance Number: _____

Gender: _____

Race: _____

Language(s) spoken: _____

Education (last grade completed): _____

Current school: _____

Parent/Legal Guardian contact name and number: _____

Part A: Address and Living Arrangement

Address (street address, city, state, zip code, county): _____

With whom is the child living? Check the appropriate selection

With parent(s)	☐	With friends or other unrelated persons	☐
With a relative who is not the child's parent	☐	Unaccompanied (by him or herself)	☐
With a guardian or foster parent	☐		

Where is the child currently living? Check the appropriate selection

Homeless	At-Risk for Homelessness
Outdoors ☐	Doubled up/couch-surfing ☐
Shelter ☐	Received eviction notice or has substantial arrears in rent/utilities ☐
Transitional Housing ☐	Permanent supportive housing that is grant funded (Housing First placements) ☐
If homeless, how long has the child been homeless: Years _____ Months _____	Currently in or exiting foster care ☐
	Hospital/Residential Treatment/Group Home ☐
	Juvenile detention facility ☐

If the child is in a hospital, treatment, or juvenile detention facility, is he/she expected to be released within 30 days?
☐ Yes ☐ No Was he/she experiencing homelessness before entering the facility? ☐ Yes ☐ No

Part B: Current or Past Applications for SSI

Has the child previously applied for Supplemental Security Income (SSI)?	☐ No ☐ Yes	If yes, date: _____
What was the decision on the application?	☐ Pending ☐ Denied ☐ Approved (previously received SSI)	If pending, is the child working with a lawyer? ☐ Yes ☐ No If denied, did the child appeal? Is he/she waiting on a decision? Is he/she working with a lawyer? If the child previously received SSI, please list the dates: Why is the child no longer receiving SSI?

SSI/SSDI Outreach, Access and Recovery (SOAR) Technical Assistance Center

April 23, 2018

Practice Cases: Videos and Records



XYZ Community Shelter
Housing is Healthcare!

PROGRESS NOTE

Date: 10/01/2017
Resident: The Williams Family (Kimberly,
Marshall and Jessica)

Case Worker: Sandy Jenkins
Location: Shelter Office

Some City Youth Mental Health Center
Recovery is Possible!

PSYCHIATRIC EVALUATION

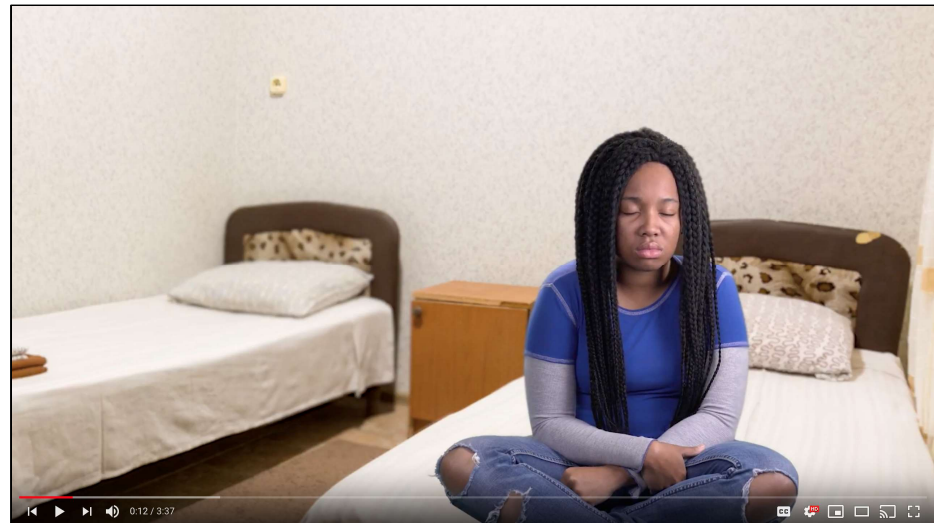
Program Participant: Marshall G. Williams
Participant ID: 1234567
Date of Birth: 02/19/2006
Gender: Male
Ethnicity: Caucasian

Diagnosis:

314.01 Attention-Deficit/Hyperactivity Disorder (ADHD)
300.02 Generalized Anxiety Disorder
Z55.9 Academic or Educational Problem

History of Present Illness:

Marshall has a history of ADHD and anxiety and has been taking Adderall daily since



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Getting Involved: Time Commitment

- Training: 20 hours
- 20-40 hours per complete application
- SOAR Critical Components
- Outcome Tracking
- Benefit to Your Agency and the Individuals You Serve



Getting Involved with SOAR
You want to be a SOAR provider? That's great! Here's what to expect.

SOAR promotes recovery and wellness through increased access to Social Security disability benefits for eligible individuals who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR providers assist individuals with complete and quality applications. This is not an easy task, and we want to be sure that you understand the commitment required – we believe it is well worth the effort!

Training
The SOAR Online Course trains providers to assist individuals with the Social Security disability application process. The course includes an Adult Curriculum for assisting with Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) claims for adults and a Child Curriculum for assisting with SSI claims for children.

- The SOAR Online Course: Adult and Child Curriculums are free and are located on the SOARWorks website (<https://soarworks.praire.com/content/soar-online-course-catalog>).
- Each curriculum consists of seven classes, each of which has a series of articles, short quizzes, and a practice case component. The practice case provides an opportunity for trainees to apply what they have learned in the course by completing a sample application packet for a fictitious applicant using SOAR techniques.
- It takes approximately 20 hours to complete each curriculum and participants can work at their own pace, starting and stopping as they wish. However, we encourage students to complete the curriculum within 30 days to retain the information learned.
- Upon successful completion, participants will receive 20 CEUs (continuing education units) from the National Association of Social Workers (NASW).

Many SOAR Local Leads offer one-day SOAR Online Course Review Sessions to review key components of the curriculum, discuss local/state practices, and connect new providers to local Social Security Administration (SSA) and DDS (Disability Determination Services) offices.

Time Commitment
We estimate that each SOAR application will take approximately 20-40 hours to complete, from initial engagement to receiving a decision on a claim. This generally occurs over the course of 60-90 days.

- The time spent on each application will vary depending on the amount of engagement that is needed as well as other variables such as the experience level of the SOAR worker. For example, engagement with an applicant who is residing in an institution may take 20 hours, while it may take longer to connect with someone who is living outside or difficult to contact.

SOAR Critical Components
SOAR providers with higher approval rates credit their success to implementing the SOAR critical components¹ and submitting high quality applications. Use of these components significantly increases the

Getting Started

- Identify children and youth counterparts with existing stakeholders
 - Ask them for their contacts in each specialty area
- Organize a SOAR for Children Orientation
 - Assess current need and capacity
- Schedule a separate meeting with SSA/DDS to discuss the SOAR process for child SSI claims
- Include youth on your steering committee

Integrating Child and Youth Providers

- Hold inclusive meetings representing adult and child SOAR stakeholders
- Form workgroups or subcommittees that can focus on special areas/issues as they arise
- Workgroups and subcommittees report back to the full steering committee

Online Application Tracking (OAT)



All the reasons
OAT is awesome!



- Web based
- User friendly
- HIPAA compliant
- Monitors quality
- Takes only 3-5 minutes
- It's FREE!

<https://soartrack.prainc.com>

OAT Case Worker Dashboard

Dashboard Applications Reports
Hi, Sarah Smith (Case Worker) Logout

30
pending

Sarah Smith (Case Worker)
 Agency One • Test City • YY
 #12100

My Initial Outcomes

Approvals	Denials	Decisions	Days
70% 86 Approved	30% 37 Denied	123 Total Initial	30 AVG Days

YY
 Approvals
85%
 100 Total

National
 Approvals
65%
 53752 Total

New Applicants
 Applicant ID

 Example: Jane Doe, born in 1985,
 with a SSN of 123-45-6789. ID = ja85do6789
Create Applicant

Monthly Snapshot

0
 New Apps this Month

INITIAL
RECON
ALJ
NON SOAR

0
 Approved Apps this Month

INITIAL
RECON
ALJ
NON SOAR

Pending Apps All Apps

Sarah Smith - Pending Applications

Application Type
 Show All

Export CSV

Show 10 entries

Search:

ApID	PFD Date	App Date	Type	Status	Actions
an58fa2222	-	-	ALJ Hearing using SOAR	PENDING	Continue
dd12ww0345	-	12/14/2016	Reconsideration using SOAR	PENDING	Continue

Next Steps

- ✓ Learn more about SOAR
- ✓ Get in touch with your SAMHSA SOAR TA Center liaison
- ✓ Reach out to your local or state SOAR leads
- ✓ Register for the SOAR Online Course

Additional Resources

- SOAR Works Website and Online Course:
<https://soarworks.prainc.com/>
- SOAR Outcomes Tracking: <https://soartrack.prainc.com/>
- SOAR Children and Youth Resources:
<https://soarworks.prainc.com/article/children-and-youth-resources>
- SSA Disability Information:
<https://www.ssa.gov/benefits/disability/>
- SSA Employment Supports: <https://choosework.ssa.gov/>

SOAR in Maryland: A State Lead's Plan of Action

Caroline Bolas

Maryland SOAR State Lead
Behavioral Health Administration
Catonsville, Maryland

February 21, 2019



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Overview of Maryland's SOAR Program

- Over 1,600 submitted SOAR claims since 2009
- 86% approval rate for initial claims and 77% for appeals
- Quality applications supported in various ways, for example:
 - Integrated online and in-person trainings, SOAR certification, dedicated DDS examiners, local leads and workgroups, state planning group, annual SOAR conference
- Combination of funded and non-funded SOAR-trained case managers

Key Reflections from Children's Leadership Academy

- My feelings: Daunting, but exciting!
- Opportunity to reflect on how we are currently implementing adult SOAR
- Importance of taking Children's Online Course Curriculum
- Learning community

Key Lessons from Adult SOAR Program

- What didn't work well:
 - Rushing to train without first undertaking preparation work
 - Having providers submit applications without agreed upon processes in place
 - Training a large number of people regardless of role

Key Lessons from Adult SOAR Program Cont.

- What worked well:
 - Establishing SOAR in one area at a time
 - Having Local Leads with in-depth knowledge of their communities
 - Focusing on data and celebrating successes
 - Acting quickly to deal with issues/challenges
 - Obtaining agreement from providers on signing Medical Summary Reports (MSRs) and supplying medical records prior to starting SOAR applications

Initial Reflections on Plans for Children and SOAR

- Importance of integration with existing SOAR program
 - Importance of quality control
 - Importance of building on existing relationships
 - Potential benefits for those parents who do not have a home, but do not qualify for SSI/SSDI themselves
 - Increased potential for serving those age 18 who either did not qualify for SSI or who need an age 18 redetermination
 - Ability to use expertise gained over the years

Initial Reflections on Plans for Children and SOAR Cont.

- Research!
 - Find out who are the key stakeholders
 - What is their familiarity with SOAR?
 - What will their role be in the process?
- Need and value proposition for SOAR
- Choosing possible pilot site(s)

Initial Reflections on Plans for Children and SOAR Cont.

- Pilot
 - Identify who will take on role of local lead
 - Plan local stakeholder meeting and agree on who to invite
 - Create a work plan
 - Have attendees participate in development of SOAR processes for their pilot area
 - Obtain buy-in from Agency Directors
 - Be clear this is a pilot, and that we are learning together - SOAR Pioneers!

SOAR for Children in Austin: Starting with Me First!

Suzie Brady, MMT
Austin/Travis County SOAR Local Lead
Integral Care
Austin, Texas

February 21, 2019



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Overview of Integral Care and SOAR

- Local Mental Health Authority for Austin/Travis County
- SOAR Co-Lead with CoC SOAR Systems Coordinator
- 14 SOAR-trained employees across 10 different clinics/programs
- 3 full-time dedicated SOAR Specialists
- 1 full-time SOAR Team Lead

SOAR Child Curriculum and Leadership Academy Thoughts

- Yes, you need to take the Children's Online Course!
 - you won't regret it
- Leadership Academy
 - inspiring and invigorating!
- Importance of Community
 - local/state/national

Identified Action Plan Steps

- Implementation of SOAR for Children within my agency
 - starting with me first!
- Send out information/interest survey on homeless service provider and SOAR provider electronic mailing lists
- Talk to CoC about incorporating into screening questions for children SSI into our Coordinated Entry system

Research

- Child/family serving agencies for training and referrals
- Existing SOAR agencies that also serve children
- State Coordinator for McKinney-Vento (located in Austin)
- School-based Therapists within my agency

Austin/Travis County

- How it fits into Austin's Action Plan to End Homelessness
- Incorporating into 'Youth Homelessness Demonstration Program'
- Identify a child-specific Local Lead for our community

SOAR Provider Experience with SSI for Children: Julian's and Janey's Stories

Laura Kolb, JD

Staff Attorney

Homeless Advocacy Project

Philadelphia, Pennsylvania

February 21, 2019



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History of Homeless Advocacy Project (HAP) and SOAR

- 2,880 SOAR claims filed since 2009 with 91% approval rate
- Average processing time of 58 days
- In-house model supplemented with SOAR-trained case managers

HAP's Current SOAR Projects

- Office of Homeless Services
- Dept. of Behavioral Health (DBH)
- Dept. of Human Services (DHS)
- Justice Project
- Veteran's SOAR
- SAMHSA's Cooperative Agreements to Benefit Homeless Individuals grant (CABHI)

Child SOAR Expansion

- Next Steps
 - Preliminary discussions with partners and providers
 - Social Security Administration (SSA) field offices
 - Division of Disability Determination Services (DDS)
 - In-house planning
 - Pilot project- goal of 20 children's claims (hopefully Spring of 2019)
 - Funding ideas
 - Outreach plans/ways to generate referrals

Reflections on Experience Representing Children with SSI Claims

- Takeaways from Children's Leadership Academy
 - Children's claims are different!
 - SOAR Children's curriculum essential to successful claims

Sharing HAP's Success with Children's SSI

- Julian's Story



- Janey's Story



Questions and Answers

Please type your questions into the Q&A box on the right of your screen

Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

<https://soarworks.prainc.com>

soar@prainc.com

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) • 1-800-487-4889 (TDD)