

NORTH CAROLINA'S SOAR PROJECT



North Carolina Coalition to End Homelessness
 securing resources • encouraging public dialogue • advocating for public policy change
 919.755.4393 • www.nceh.org

Overview of SOAR

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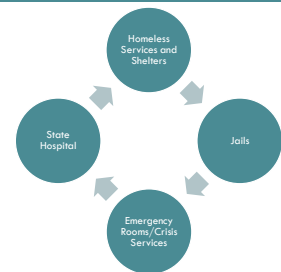
Mission

To increase the number of successful applications for SSI and SSDI for eligible people who are homeless or at risk of homelessness in order to facilitate their recovery and enable them to become successful, contributing members of their communities.

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The Current Cycle

- ❑ Does not address the needs of the individual
- ❑ Expensive for communities
 - Crisis services cost more than outpatient care for LMEs/MCOs and Hospitals
 - Jail and Shelter costs
 - Longer and more frequent state hospital stays
- ❑ For those who cannot work due to disability, SSI/SSDI benefits are the key to break this cycle



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How to Break the Cycle

- ❑ SSI/SSDI income allows for access to housing programs
- ❑ SSI/SSDI health insurance allows for access to more services to address needs
- ❑ Stable Housing and Services reduces need for inpatient treatment and crisis services
- ❑ Stable Housing and Services increases the therapeutic benefits of treatment

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Challenges for the Disabled and Homeless

- ❑ Path to recovery is extraordinarily challenging when basic needs are unmet
- ❑ SSI/SSDI application and disability determination process can seem complex
- ❑ Disconnect between the experience of homelessness and the disability application process

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Challenges for the Disabled and Homeless

- Medical information is often very incomplete
- Only about 10-15% of homeless individuals who apply are typically approved on initial application
- Appeals take years and many potentially eligible people give up and do not appeal



What is SOAR?

SSI/SSDI Outreach, Access and Recovery (SOAR) is a strategy that helps states to increase access to SSI/SSDI for people who are homeless or at risk of homelessness through:

- Strategic planning
- Training
- Technical assistance for caseworkers and communities

SOAR currently operates in all 50 states and has national success rates on initial application of 65 percent and the average time for decision is 94 days.*

*Based on 2014 Outcomes reported by PRA

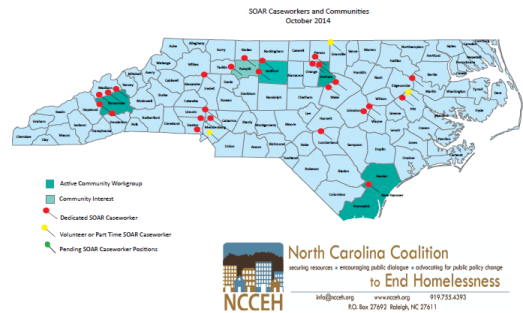


History of SOAR in NC

- NC became a SOAR State in 2007
- Initial strategy to train large numbers of case managers and direct service providers
- 2009 – Began to focus developing and training dedicated SOAR caseworker positions within programs (currently 24 positions)
 - PATH Teams/Homeless service providers
 - Community mental/medical health clinics
 - DSS
 - Hospitals
 - LMEs/MCOs



SOAR Caseworkers and Communities



NC Outcomes

Outcomes as of December 31, 2014

| | |
|---|-------------------------------|
| Total Outcomes Reported | 1,608 |
| Total Approved (8 deaths prior to decision) | 1,287 |
| Total Denied | 313 |
| Approval rate | 80% |
| Average time between completion of application and determination | 100 days (Median: 88 days) |
| Percentage that required CE | 38% |
| Average length of time homeless prior to application | 2 years, 8 months |
| Income brought into state since June 2, 2010 (includes first year of annual income and back pay awarded to applicants) | \$17,068,185.21 |

SOAR Process vs. Business as Usual

- SOAR focuses on the initial application
 - “Getting it Right the First Time”
 - 82% of NC SOAR cases are initial applications
- SOAR Caseworkers take on the role of SSA 1696 Representative
- SOAR Caseworkers gather medical records and interview applicant before submitting the application to SSA
- SOAR Caseworkers write a Medical Summary Report



Medical Summary Report

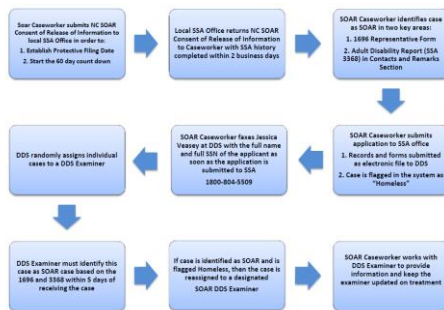
- Document that is unique to SOAR; often makes the difference between approval and denial for our clients
- Co-signed by the treating M.D. or PhD. Psychologist so that it is considered as medical evidence
- Tells the full story of the applicant, **clearly linking** their diagnoses to functional impairments
- SOAR Caseworkers receive intensive training and TA on their medical summary reports

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SOAR Process: Partnering with SSA and DDS

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NC SOAR Process: SSA and DDS



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NC SOAR Process: SSA Field Offices

- SOAR Caseworkers identify potential applicants
- SOAR Caseworkers fax the "SOAR Project Consent for Release of Information" form to the local SSA office:
 - Establish PFD for case through establishing a LEAD in the SSA system
 - Start 60 day "clock" to submit application
- SSA Field Office will complete the form and fax it back to the SOAR Caseworker within 2 business days

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NC SOAR Process: SSA Field Offices

- SOAR Caseworker works with applicant to:
 - Gather medical records
 - Write a Medical Summary Report
 - Submit SSA-16, SSA-i3368 online
 - Make appointment at office for SSA-8000
 - Submit SSA-1696 and SSA-827s to local office
- SSA Field Office
 - Enters forms submitted into electronic file
 - Enters an electronic "Homeless" Flag if applicant qualifies

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NC SOAR Process: SSA Field Offices

- Agreement with SSA, DDS, and SOAR program
- SSA Field Offices fulfill commitments differently:
 - Designate one CR to handle all SOAR applications
 - Designate one staff person to manage "SOAR Project Consent for Release of Information" form and establish lead
 - Train SOAR Caseworkers to complete SSA-8000 in the field
- Goal of SOAR is to work in partnership with SSA Field Offices and DDS to facilitate applications for most vulnerable

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Role of NCCEH

NCCEH contracts with DHHS to manage NC SOAR Program. We provide training and technical assistance for SOAR caseworkers and communities.

Caseworkers

- ▣ 2 day SOAR Training
- ▣ SOAR Caseworker Certification
- ▣ Monthly SOAR Dialogue Phone Calls
- ▣ Ongoing TA

Communities

- ▣ SOAR Essentials training for overview of SSI/SSDI and SOAR
- ▣ SOAR Community Certification
- ▣ TA provided to communities to start Disability Workgroups in order to develop community supports for SOAR case workers.
- ▣ Facilitate trainings for doctors and other treatment providers on documenting disabilities

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Contact NCCEH

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- ▣ NCCEH Webpage: www.ncceh.org
- ▣ Learn more! Join our mailing list! Become a member!

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