

# SOAR DIALOGUE GROUP

## 2/16/12



North Carolina Coalition to End Homelessness

securing resources • encouraging public dialogue • advocating for public policy change

919.755.4393 • [www.ncceh.org](http://www.ncceh.org)

## Introductions

Please tell the group:

- Name
- Where you work
- What agency you are with
- Any updates for SOAR this month

## Check In

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How is everyone feeling this month?  
Excited? Frustrated? Burnout?

Questions to pose to the group?

## Today's Call

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- Announcements/Updates
- Update on SOAR meeting with SSA/DDS
- Discussion about how to cultivate referrals:
  - ▣ Review information from PRA webinar on identifying SOAR applicants
  - ▣ Challenges to getting quality referrals
  - ▣ Brainstorm ideas about increasing quality referrals for SOAR

## Announcements/Updates

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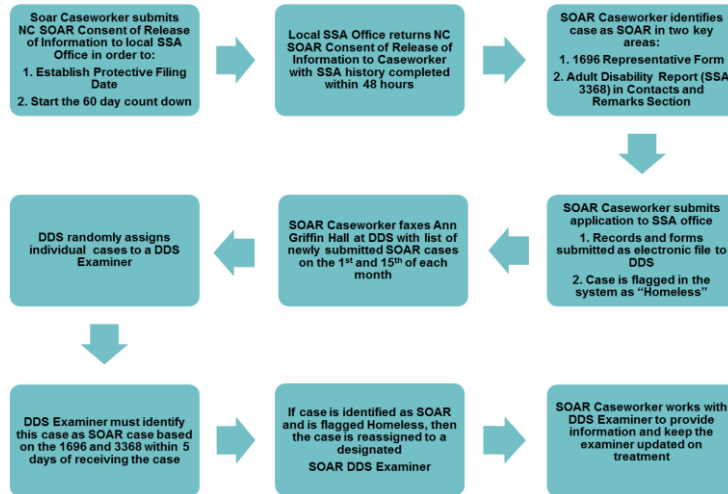
- SOAR Training in Hickory
  - February 29- March 1, 2012
  - Hickory, NC
  - Anyone interested in attending can find more information on our website:  
<http://ncceh.org/en/cev/538>
  - Still spaces!
- New Outcome Form on the website

## Meeting with SSA/DDS

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- ICCHP (Interagency Council on Coordinating Homeless Programs) leadership organized a meeting re: SOAR
- Reviewed SOAR data as it relates to the NC SOAR Process
- Discussed strengthening NC SOAR Process as the program expands

# Meeting with SSA/DDS



# Meeting with SSA/DDS

Cases Receiving "Homeless Flag" in Electronic File (tracked since September 2010):

**Question:** Was the application given the SSA "Homeless Flag?" If no, why not?

**Outcomes:** 286 Outcome Reports answered this question

- 77 applications were not given a "Homeless Flag" by SSA
- 55% applications not given "Homeless Flag" reported applicant as currently homeless
- Of these 42 cases, the majority (45%) reported that the application was filed by the applicant before being referred to the SOAR caseworker

# Meeting with SSA/DDS

Cases Reassigned to SOAR designated DDS Examiners (tracked since September 2010):

**Question:** "Was the case reassigned to a SOAR DDS Examiner?"

**Outcomes:** 262 Outcome Reports answered this question

	Applications Reassigned	Applications Not Reassigned
Number of Applications	134	128
Approval Rate	84%	80%
Average Decision Days	87 days	120 days
Requested Consultative Exams	49%	33%
Applications with SSA "Homeless Flag"	96%	52%
Additional Notes	5 cases that were reassigned were for "at risk" applicants without a "Homeless Flag"	31 cases that were not reassigned did not receive a flag despite the applicant being reported as homeless

# Meeting with SSA/DDS

SOAR Applications for individuals at "Imminent Risk of Homelessness" (tracked since April 2009):

**Question:** Length of time homeless as of Protective Filing Date

**Outcomes:** 65 Outcome Reports reported for "at risk" applicants

- 13% of total cases reported since April 2009
- 78% approval rate
- 22% requested CE
- Average decision time: 98 days

## Meeting with SSA/DDS

### Outcomes of Meeting

- SSA:
  - ▣ State rep will review our data with his office and work to improve flagging of homeless cases and identify a way for offices to uniformly identify SOAR cases in the electronic file
  - ▣ State rep for SSA will send out an update on the SOAR process to all field offices- have not received an update since 2009
  - ▣ State rep will ask field offices to designate a contact in their office who has time to handle SOAR process steps (returning fax, est. PFD)
  - ▣ SOAR has offered to do trainings for local offices if needed and has asked SSA to inform about issues with SOAR applications

## Meeting with SSA/DDS

### Outcomes of Meeting

- DDS:
  - ▣ Key to reassignment process to fax Ann Griffin Hall on the 1<sup>st</sup> and 15<sup>th</sup> of every month with open cases- SOAR to follow up with caseworkers who are currently not faxing list
  - ▣ To improve processing at DDS, SOAR needs:
    - Include a Medical Summary Report with ALL the information discussed in the *Stepping Stones to Recovery Manual* (specifically mentioned) longevity issue (personal history) AND functioning information
    - Get Medical Summary Reports and medical records to DDS as soon as possible- may need to delay filing application until you have this information ready
  - ▣ SOAR and DDS have agreed to share ongoing feedback about the current process

## Meeting with SSA/DDS

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Questions?  
Feedback?

## Quality Referrals: PRA Webinar

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### SOAR Fundamentals


- Key eligibility criteria for SSA disability benefits
  - Severe impairment that affects ability to earn SGA
  - Duration requirements
  - Symptoms
  - Functional impairment

# Quality Referrals: PRA Webinar

## SOAR Recommends

- Not essential, but may strengthen an application
  - Prescribed medications, ongoing symptoms
  - Obtainable medical evidence or one time exam is sufficient
  - Difficult work history

 SSI/SSDI Outreach, Access and Recovery

 Substance Abuse and Mental Health Services Administration  
Center for Mental Health Services

# Quality Referrals: PRA Webinar

### Identifying SOAR Applicants

The tool is intended to help case managers identify adults who are experiencing or at risk for homelessness who meet the criteria for Social Security Administration (SSA) disability benefits. While we do not wish to discourage anyone from applying for this benefit, this tool should help you identify individuals that meet and/or provide with their application.

SOAR is designed to serve individuals who are able to apply for benefits as an adult under SSA rules. This includes persons 18 years of age or older as well as individuals who are within one month (90 days) for people who are aging out of the three year window of their "off" benefits. Individuals age 18 or over with low income and resources may be eligible for SOAR based on age as the eligibility for continuous benefits based on their work history.

**SOAR Fundamentals:** The following characteristics represent the eligibility criteria for SSA disability benefits:

- Applicant has a serious mental illness or serious cognitive and/or low income physical illness that either is or has the potential to be a substantial barrier to work (SSA definition)
- The illness(es) or condition(s) have lasted or are expected to last for at least 12 months (or result in death)
- Individual is currently exhibiting symptoms of mental illness or has a past with increasing of symptoms that prevent meaningful employment. For example:
  - Personality symptoms (paranoia, delusions)
  - Depressive symptoms (depressed energy, lack of motivation, suicide ideation)
  - Manic symptoms (excess energy, disrupted thought)
  - Anxiety (agitation, restlessness)
  - Cognitive deficits (short memory, problems with concentration, memory, etc.)
  - History of trauma history of abuse, past trauma, stress disorders, etc.)
  - Other
- For applicants with mental illness, they do for medical certification in at least 2 of three functional areas:
  - Activities of Daily Living (personal hygiene, cooking, shopping, transportation, etc.)
  - Social functioning (getting along with others, anger, avoidance, etc.)
  - Concentration, persistence and pace (can they follow the ability to complete tasks)
  - Required physical of developmental Abnormalities, incoherence, being off-balance, etc.)

**SOAR Recommendations:** The following characteristics are not essential, but may strengthen an application:

- Applicant is prescribed psychiatric medications and continues to experience symptoms and functional impairment
- Applicant has obtainable medical evidence (in at least part of the past 12 months) that corroborates mental illness and medical condition. The medical evidence or large gaps in treatment:
  - Applicant lacks exhibiting symptoms even though they are not receiving psychiatric or physician medical services or care
  - Care into a medical services report that clearly compares and functional impairment that corroborates medical condition
- Applicant is not working due to medical and/or psychiatric condition(s) or not because he/she cannot find work or new job offer:
  - History of failed work attempts (actual and alleged employment due to diagnosed disability)
  - Long work history, but can't be helped work up to SSA's 15-20 month due to conditions
  - Substantial work history due to conditions and other factors

SSA/SSDI Outreach, Access and Recovery | November 11, 2011

 SSI/SSDI Outreach, Access and Recovery

 Substance Abuse and Mental Health Services Administration  
Center for Mental Health Services

- PRA has a tool for identifying applicants
- The tool is available on our website: [nccch.org/caseworkers/](http://nccch.org/caseworkers/)
- Add your program criteria
- Use in conjunction with other assessment tools



## Quality Referrals

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- Does anyone use a referral form or checklist to get referrals from the community or your agency?
- Are there other tips to streamline the referral process?
- What do you do if you decide not to take on a referral as a SOAR applicant? Referrals? Explanations?

## Quality Referrals

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### Brainstorm:

Where can we get referrals from?  
What are some agencies/places to look for referrals?

## Next Call...

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March 15<sup>th</sup> at 10 am

Please email me if you have topics that you would like to discuss: [emily@ncceh.org](mailto:emily@ncceh.org).