

Webinar Format

- Webinar will last approximately 1.5 hours
- Participants' phone connections are “muted” due to the high number of callers
- Questions submission process:
 - **During the webinar using the Q&A function on the right-hand side**
 - Can also submit anytime during briefing to timothy.underwood@va.gov
- If you are using your computer speakers instead of phone for audio, please make sure your speakers are turned on



Increasing Access to Income and Benefits

Presented for SSVF and GPD providers

August 2015

Agenda

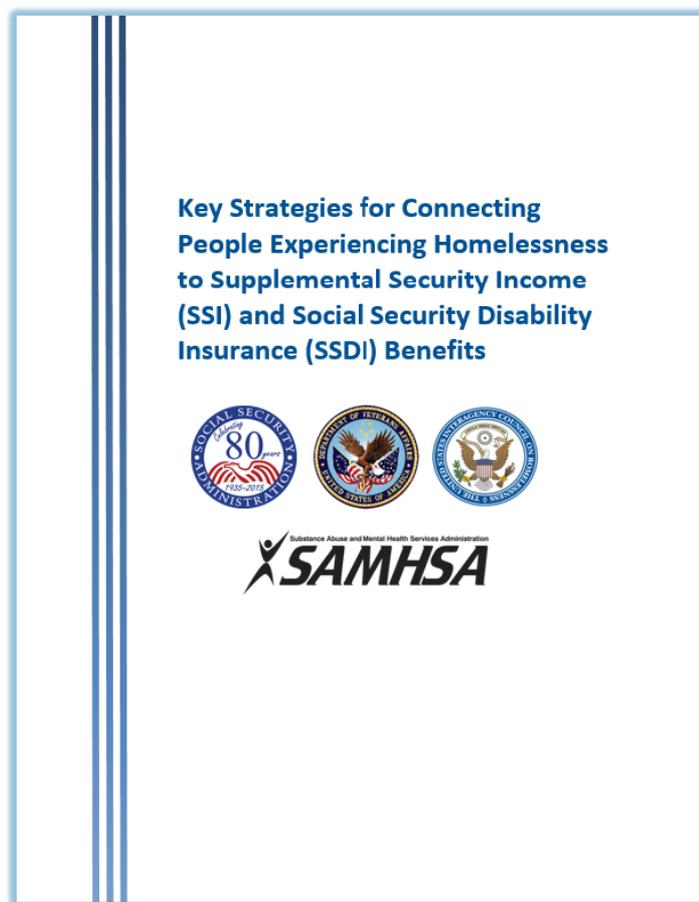
- Importance of Increasing Access to SSI/SSDI (3 minutes)
- Key Strategies Guide Overview (7 minutes)
 - SOAR identified as an interagency key strategy
- VA Homeless Program Grantee SOAR Application (10 min)
- SSVF and GPD SOAR Integration (10 min)
- SOAR Overview Briefing (30 min)
- Grantee Application (10 min)
- Questions and Answers (20 min)

The Importance of SSI and SSDI for People Experiencing Homelessness

- SSI/SSDI are a **primary source of income** for many people experiencing homelessness with disabilities.
- **Can be used to pay for:**
 - housing,
 - essential household needs,
 - and medical care or supplies.
- SSI/SSDI benefits, in concert with other programs, can help individuals experiencing homelessness transition into **stable and permanent housing**.

Key Strategies for Connecting People Experiencing Homelessness to SSI and SSDI Benefits: Background

- Developed by USICH, SSA, SAMHSA, and VA
- Provides guidance to the field on key strategies for linking eligible adults to benefits
- Intended to improve practice and collaboration among SSA field offices, VAMC staff, and other organizations and community-based partners



Key Strategies for Connecting People Experiencing Homelessness to SSI and SSDI Benefits: Five Key Strategies

1. Assisting People Experiencing Homelessness with the SSI/SSDI Application Process
2. Coordination with SSA Field Offices, Community Organizations, and other Federal agencies
3. Coordination with other Benefits and Entitlements
4. Working with Veterans and other Special Populations
5. Assisting SSI/SSDI Beneficiaries Post-Entitlement

Key Strategies for Connecting People Experiencing Homelessness to SSI and SSDI Benefits: Grantee Application

1. Register for SOAR Online Course
2. Use a Coordinated Assessment Tool
3. Measure and Share Progress

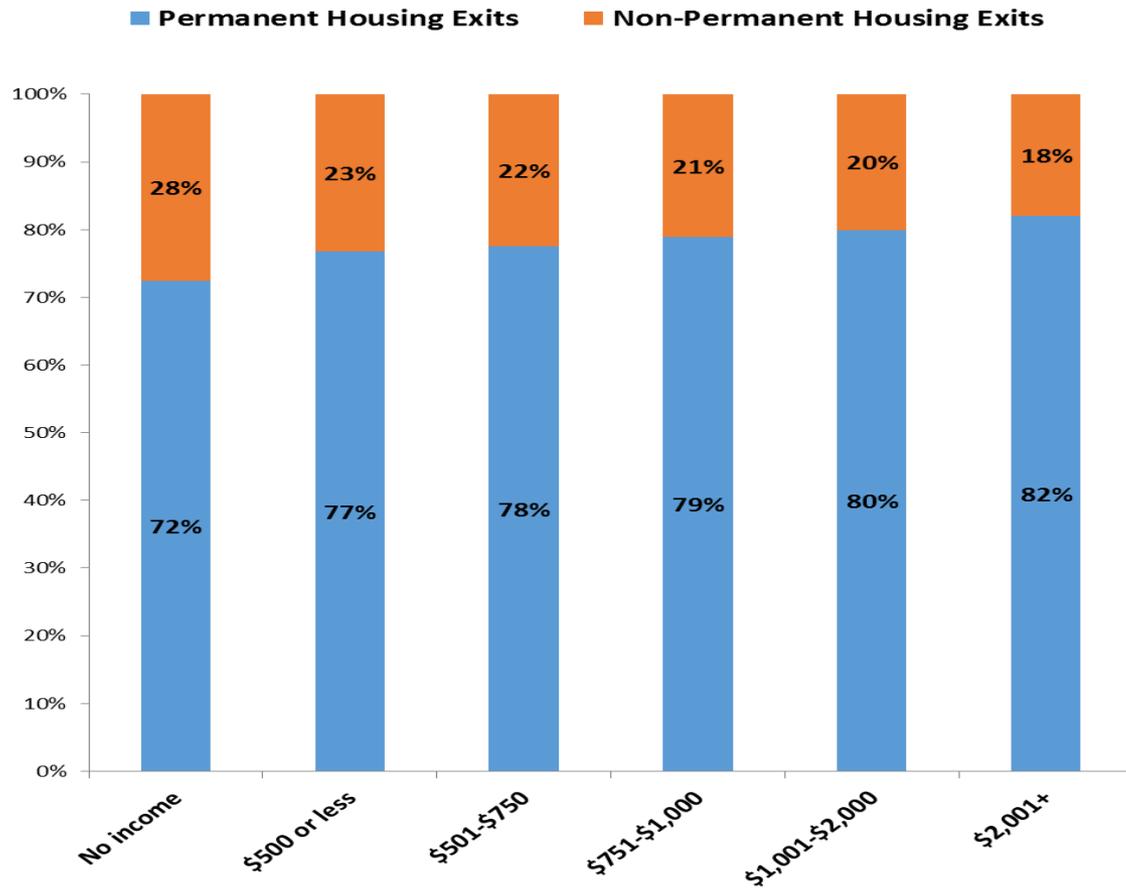
SOAR Integration: SSVF and GPD

SSVF and SOAR

SSVF National Goals:

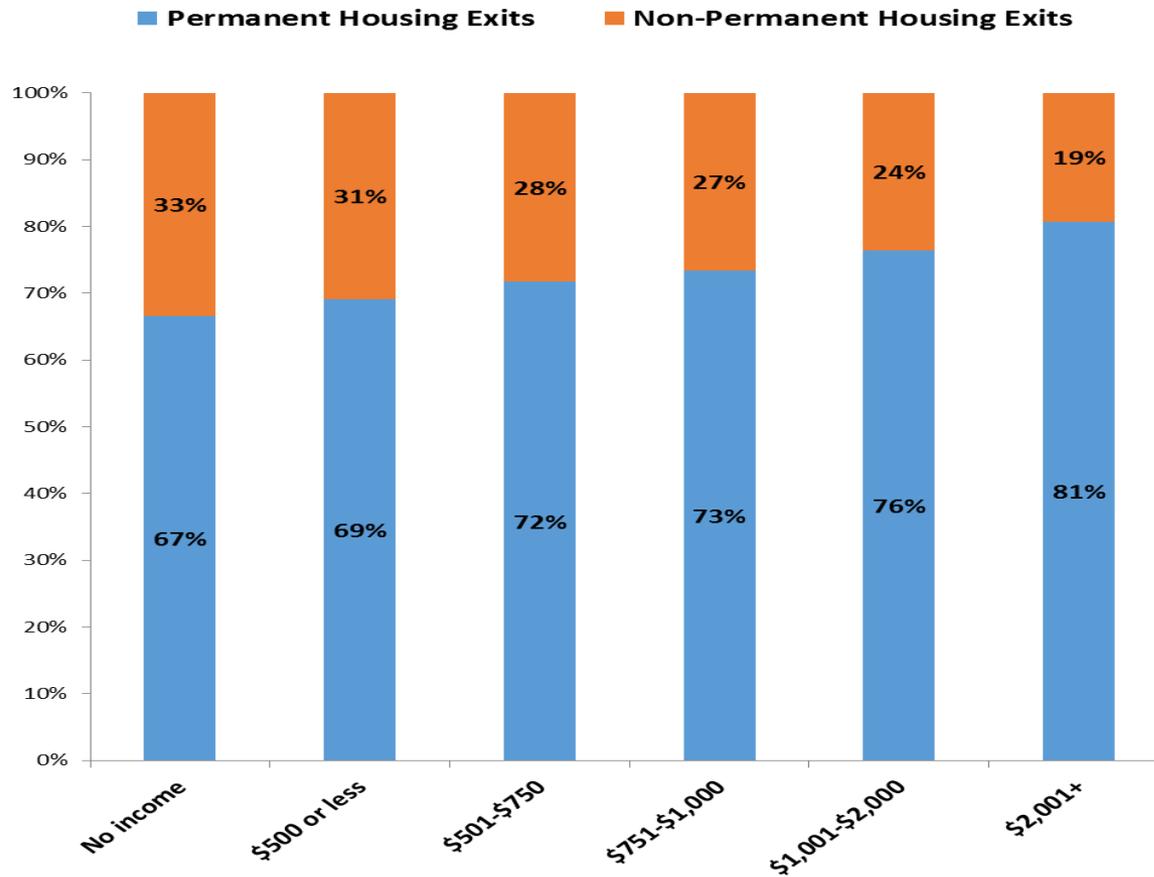


SSVF PH Success Rates by Monthly Income at Program Entry Among Veterans Served FY 2014



With VASH Subsidy

SSVF PH Success Rates by Monthly Income at Program Entry Among Veterans Served FY 2014



Without VASH Subsidy

SSVF and SOAR

1. Training/Capacity Building

- Engaged with SOAR since December 2013
- As of February 2015, 146 grantees completed the 16 hour training

2. Communication/Policy

- In October 2014, SOAR included in new grantee/staff orientation
- In February 2015, validated SSVF grantees work by codifying SOAR in NOFA

3. Data/Reporting

- HMIS/Repository data that includes income

GPD and SOAR

GPD National Goals:



Exits to Permanent Housing

- Exit to independent housing
- 65% or more



Reduce Negative Exits

- Negative Exits
- 30% or less



Increased Income

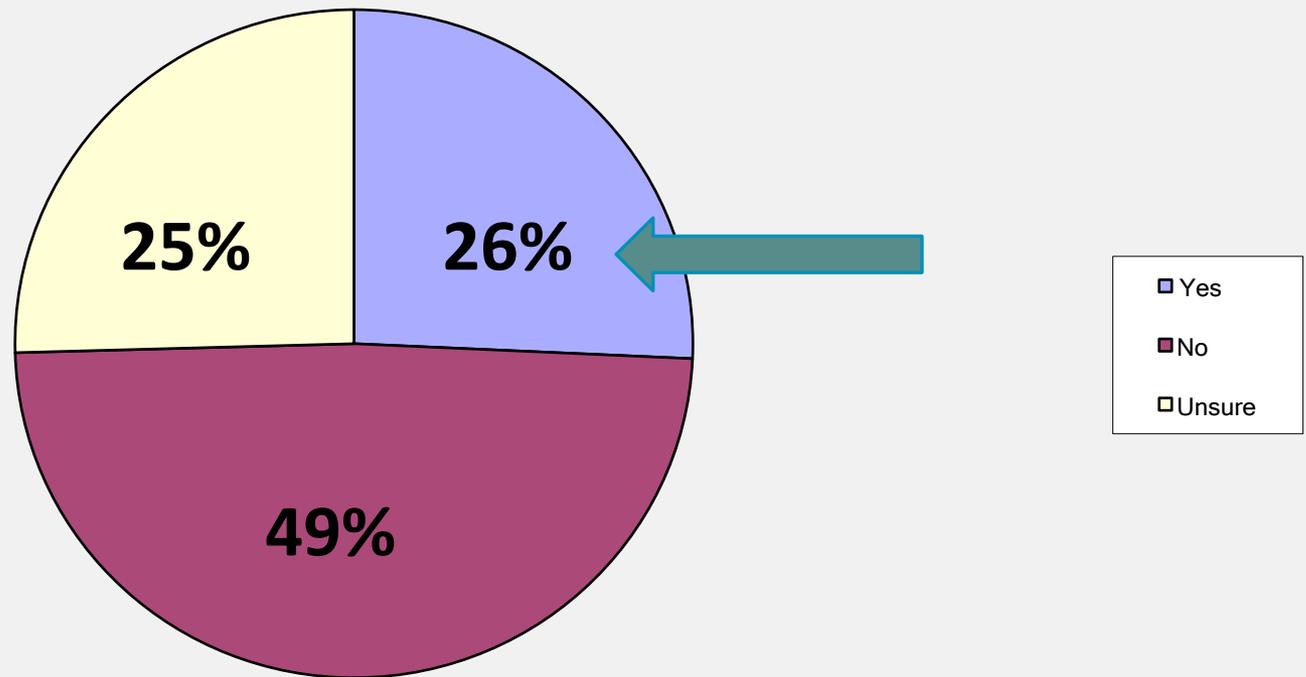
- Employed at Exit (42% or more)
- Accessing SSI/SSDI directly aligns with increasing income

GPD SOAR Survey Data Analysis

1. Approximately 26% of GPD providers are using SOAR - with many of them seeing successful outcomes for increasing access to SSI/SSDI for the Veterans.
2. Approximately 53% of GPD grantees are using a Coordinated Assessment Tool such as the VI SPDAT or another local tool– helping them prioritize their limited time and resources for the Veterans they serve by knowing who are the best SSI/SSDI Candidates.
3. Approximately 90% of GPD grantees have a standardized process to monitor income at entry and exit for each served Veteran they serve – allowing them to measure income progress.

Additional GPD SOAR Data Highlights

Does your GPD Program Use SOAR?





SSI/SSDI Outreach, Access and Recovery (SOAR)

Presented for SSVF and GPD providers

August 2015

SOAR Technical Assistance Initiative

- SOAR – SSI/SSDI Outreach, Access & Recovery
- For people who are experiencing or at risk of homelessness
- SOAR is a model for assisting individuals to apply for Social Security disability benefits
- Sponsored by the Substance Abuse & Mental Health Services Administration (SAMHSA) in collaboration with SSA since 2005
- SOAR is active in all 50 states; no direct funding is provided to states
- SOAR TA Center helps states and communities by providing technical assistance and training

Changing Lives Since 2005

- 22,810 persons experiencing or at risk for homelessness have been approved on initial application
- 65% approval rate overall, in an average of 94 days in 2014
 - Top 10 SOAR states have average approval rate of 82%
- Compares to 10-15 percent for unassisted applications from people who are homeless and 29 percent for all applicants
- Appeals can take a year or more; many people give up and do not appeal

What is the need?

- The January 2014 point-in-time count identified almost 50,000 homeless Veterans
 - SOAR can also serve those who are at-risk for homelessness, or who recently entered permanent housing without income
- Half of Veterans experiencing homelessness have severe mental illness and over half have other health issues
- High prevalence of traumatic brain injury (TBI), post-traumatic stress disorder (PTSD), and sexual trauma among homeless Veterans contributes to difficulty in maintaining employment and housing

SSI & SSDI: The Basics

Supplemental Security Income (SSI)

Needs based; federal benefit rate is \$733 per month (2015); provides Medicaid in most states

Social Security Disability Insurance (SSDI)

Amount depends on earnings put into SSA system; Medicare generally provided after 2 years of eligibility

Importance of SSI/SSDI for Veterans

- SSA disability benefits can provide access to:
 - Income – Veterans can receive SSI/SSDI in conjunction with, or as an alternative to, VA disability benefits
 - Health insurance – Veterans can use the Medicaid and Medicare health benefits that comes with SSI/SSDI to supplement VA health services
- For Veterans with disabilities, SSI/SSDI can increase income & housing stability, and reduce their future risk of homelessness
- Opportunity for staff serving Veterans to help with both SSA and VA disability benefits



SOAR and Key Strategy #1

Assisting People Experiencing Homelessness with the SSI/SSDI Application Process

SOAR and Key Strategy #1

- Become a Contact Person, Appointed Representative, or Representative Payee
- Help Claimant Create a “my Social Security” Account and Use It to Verify Clients’ Benefits Status
- Participate in SOAR Training
- Help Claimants Get Identification Documents
- Contact SSA to set a Protective Filing Date
- File SSDI online application
- Declare Homeless Status before the Application Process Begins
- Collect Medical Evidence Needed to Determine a Claimant’s Medical Eligibility
- Write a Medical Summary Report
- Use Electronic Records Express

The SOAR Model uses all of these components from Key Strategy #1

The SOAR Applicant

Who can be helped by SOAR?

- Adults who are experiencing or at risk for homelessness
- *And* who have mental illness, co-occurring disorders or other physical disabilities

Who is considered “homeless”?

- Moving from place to place throughout the month
- Living “doubled-up”
- Living in uninhabitable housing, outside or in shelters

Who is considered “at-risk for homelessness”?

- Living in unstable or non-permanent housing
- Exiting jails or prisons with no stable place to live
- Permanent housing for those recently experiencing homelessness with limited income or relying on grant funding to sustain housing
- Youth transitioning out of foster care

SSA Definition of Disability

- For SSI/SSDI, the Veteran needs to show:
 - Evidence of a physical or mental health condition, which results in functional impairments that limits his/her ability to work at a substantial gainful level (quantified as \$1090/month in 2015)
 - That the disabling condition has lasted, or is expected to last, for 12 months or end in death
- Why is the applicant unable to work?

Definition of Disability – Key differences from VA benefits

- The definition of disability and application process is different for VA and SSA benefits
 - Discharge status is not a factor in SSI/SSDI determination
 - Disabling condition does not need to be related to military service
 - Those denied for VA benefits may still be eligible for SSI/SSDI
 - Veterans can access SSA benefits while they are waiting for VA benefits
 - There is no partial disability with Social Security

Medical Summary Report (MSR)

- A letter written by the service provider and submitted as part of the application packet and includes:
 - Documentation received;
 - Narrative account of claimant's personal treatment history; and
 - Service provider's observations and assessments of the claimant's ability to function.
- Form SSA-3373: Function Report
- Co-signed by a Physician or Psychologist

SSA Fast Track Programs for Veterans

100% Permanent and Total Veterans Initiative

- Expedites SSI/SSDI applications from Veterans who have 100% P&T rating from the VA
- Does not guarantee SSI/SSDI approval

Wounded Warriors

- Veterans who received disabling mental or physical health injuries while on active duty on or after October 1, 2001
- The injury does not need to have occurred during combat operations



SOAR and Key Strategy #2

Coordination With SSA Field Offices, Community Organizations, And Other Federal Agencies

SOAR and Key Strategy #2

- The SOAR Process establishes communication with designated SSA field office and DDS representatives
 - Describes how to compile complete applications, including all required forms, medical records, and MSRs, to reduce duplication of effort with the DDS and to reduce the need for CEs
 - Promotes electronic submission of all available SSA documents and medical records
 - Includes a quality assurance checklist with each SOAR-assisted application
- Participate in local strategic planning meetings
- Strengthen system-wide communication and collaboration



SOAR and Key Strategies #3-5

Coordination with other Benefits and Entitlements;
Working with Veterans and other Special Populations
Assisting SSI/SSDI Beneficiaries Post-Entitlement

SOAR and Key Strategies #3-4

- Applying for both SSA and VA benefits at the same time helps ensure the Veteran can access income as quickly as possible
- Opportunities to increase efficiency in assessing eligibility and referral to SOAR
 1. Coordinated Entry Tools such as the VI-SPDAT contain key questions that should trigger an immediate SOAR referral and screening
 2. Program entry and case management assessments gather critical documentation that can be used in an SSI/SSDI application using the SOAR model
 3. Grantees can coordinate with the VA via a Release of Information to transfer information from their records that are needed to complete SSA disability applications, reducing the need for multiple interviews specifically for SSA benefits

SOAR and Key Strategy #5

Key Strategy #5: Assisting SSI/SSDI Beneficiaries Post-Entitlement

- Utilize Work Incentives and Employment Supports
 - Veterans can work while applying for SSA benefits and after receiving them
 - For details on SSA work incentives, see issue brief: *SOAR and Employment for SSI/SSDI Beneficiaries*
- Report Changes in Work Activity
- Report Changes that may affect SSI and SSDI



What's Next?

Using SOAR In Your Community

SOAR Online Course

<http://soarworks.prainc.com/>

- Free, web-based course to train case managers in completing SSI/SSDI applications using SOAR
- Standardized, self-paced training
- Includes completion of a practice SSI/SSDI application
- Individualized feedback from the SAMHSA SOAR TA Center
- 16 CEUs from NASW
- Class 1 of the course provides a SOAR 101

Incorporate SOAR into Your Services

- ✓ Gather more information:
 - Issue Brief: *Connecting Veterans to Social Security Disability Benefits: A Key Component in Ending Veteran Homelessness*
 - Reach out to the SOAR TA Center with questions and to help you plan how to use SOAR
- ✓ Explore options for SOAR training with your staff
 - Free online SOAR training: <http://soarworks.prainc.com>
- ✓ Collaborate with community partners to refer Veterans to local SOAR initiatives

Contact information

Kristin Lupfer
Project Director
SAMHSA SOAR TA Center
klupfer@prainc.com
518-439-7415 x 5262

Jen Elder
Senior Project Associate
SAMHSA SOAR TA Center
jelder@prainc.com
518-439-7415 x 5256

<http://soarworks.prainc.com>

 www.facebook.com/soarworks 

 @SOARWorks 

SOAR Application as a VA Grantee

Grantee Application

SOAR is one of many means to achieve permanent housing stability through income stability for Veterans with disabilities. It should be one of many tools in your toolbox to increase access to mainstream employment and income benefits.

You can immediately apply today's overview training by doing the following:

- 1. Learn SOAR** - *Become trained in SOAR using the free 16-hour online training that provides 16 CEU credits anyone can do - you'll join a community that is ready and able to assist you with increasing access to SSI/SSDI.**
 - Free SOAR online course available at: <http://soarworks.prainc.com/>
 - Identify referral SOAR providers at: <http://soarworks.prainc.com/directory>

- 2. Participate in Coordinated Entry** – *Includes using a coordinated assessment tool such as the VI-SPDAT or the local tool developed by your local community in order to help you prioritize your organization's limited time and resources by knowing who are the best SSI/SSDI candidates.*
 - *Contact your grantee's coordinator or liaison for more information on how to access.*

- 3. Track and Share Progress** - *You'll quickly be able to see the fruits of your labor for getting the Veterans your organization serves into stable income that can help get them back on their feet and into permanent housing.*

Questions and Answers
