Supportive Services for Veteran Families (SSVF) Special National Grantee Webinar

SSVF SOAR Integration Toolkit

Link to webinar audio recording

August 17, 2017 at 2:00 PM EDT
Webinar Format

• Webinar will last approximately 90 minutes
• Participants’ phone connections are “muted” due to the high number of callers
  – Questions can be submitted during the webinar using the Q&A function
• Questions can also be submitted anytime to SSVF@va.gov
Questions

Submit questions and comments via the Questions panel
Panelists

- John Kuhn, National Director, Supportive Services for Veteran Families (SSVF)

- Adrienne Nash Melendez, Regional Coordinator, SSVF

- Jen Elder, SAMHSA SOAR TA Center, National Policy and Partnerships Coordinator
Agenda

- SSVF Announcements
- Opening Remarks
- SSVF and VA Experience with SOAR
- SOAR Overview
- SSVF SOAR Integration Toolkit
- Next Steps
- Questions and Answers
SSVF Announcements

• SSVF Data for FY17
  **Grantee Priority**
  • Review your data
  • Ensure all households served are reflected in the data
  • Goal is to have the most accurate data possible as the fiscal year comes to a close
  • Incredibly important since prior data is overwritten by most recent upload
Opening Remarks on SOAR

• Background on Toolkit

• Why access to benefits is critical

• Expectations for SSVF grantees
SSVF and VA Experience with SOAR
Building, Learning, and Tweaking
Highlights

October 2013: 1st VA Memo on SOAR
December 2013: Introduction to SOAR for SSVF Grantees
October 2014-September 2015: HUD-VASH and HPACT SOAR Pilot
February 2015: SOAR in SSVF NOFA
July/August 2015: USICH Key Strategies and GPD, SSVF, and SOAR Webinar
Winter 2016: VA Caseworker’s Guide to SOAR
May/June 2017: Enhanced VA SOAR Memo and Training
July/August 2017: SSVF SOAR Integration Toolkit

Annual SOAR Surveys since 2013
Key Strategies for Connecting People Experiencing Homelessness to SSI/SSDI

- 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

https://www.usich.gov/tools-for-action/key-strategies-for-connecting-people-experiencing-homelessness-to-ssi-ssdi
HUD-VASH and HPACT SOAR Pilot and VA Caseworker’s Guide

Pilot Overview:
Increasing Veteran Access to Social Security Income/Disability Insurance (SSI/SSDI)

In October 2014, the SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance (TA) Center and the Veterans Health Administration (VHA) Homeless Program staff launched a one year pilot to increase access to SSI and SSDI through SOAR for Veterans experiencing homelessness with disabling conditions who utilize Housing and Urban Development and Veterans Affairs Supportive Housing (HUD-VASH) and Homeless Patient Aligned Care Team (H-PACT) services.

**HUD-VASH**
- The U.S. Department of Housing and Urban Development
- Veterans Affairs Supportive Housing

**H-PACT**
- The Department of Veterans Affairs (VA)
- Homeless Patient Aligned Care Team

HUD-VASH and H-PACT social workers, knowing the supportive services a Veteran needs based on their mental and physical illnesses, are well placed to provide critical documentation for SSI/SSDI applications.

Four cities were chosen as pilot sites to implement SOAR in their HUD-VASH and H-PACT programs:
- Chicago, IL
- Long Beach, CA
- Portland, OR
- Seattle, WA

Each program named 1-2 SOAR Champions, who will be trained to complete SSI/SSDI applications and lead SOAR efforts in their programs, in collaboration with their local and state SOAR initiatives.

The SAMSHA (Substance Abuse and Mental Health Services Administration) SOAR TA Center and VHA Homeless Program Office will provide technical assistance throughout the pilot, including facilitation of local VA and SOAR planning processes, guidance through the SOAR online course, and monthly check-in calls with the pilot sites.


dates:

2014-2015

2016
SOAR Policy Memos

October 18, 2013

Department of Veterans Affairs

Memorandum

Date: OCT 18 2013

From: Acting Deputy Under Secretary for Health for Operations and Management (10N)

To: Network Directors (10N1 – 23)
Chief Medical Officers (10N1 – 23)
Network Homeless Coordinators (10N1 – 23)

Subject: Employees Encouraged to Assist with SSI/SSDI Outreach, Access and Recovery (SOAR)

1. The goal to end homelessness among Veterans by the end of 2015 remains a top priority for VA. To get there, communities are highly encouraged to explore all available resources from Federal, State, and local government, as well as from the private sector. Specifically, existing resources such as Social Security Income/Social Security Disability Income (SSI/SSDI) also have the ability to substantially serve the at-risk and homeless Veteran population by providing them with consistent income that often promotes permanent housing stability, self-sustainment, functional independence, and ongoing care for at-risk and homeless Veterans’ disabling conditions.

2. Since the SSI/SSDI application process is cumbersome, VHA personnel in all homeless programs are encouraged to be trained in and utilize the SOAR

May 8, 2017

Department of Veterans Affairs

Memorandum

Date: MAY 08 2017

From: Deputy Under Secretary for Health for Operations and Management (10N)

To: Network Directors (10N-23)
Chief Medical Officers (10N1-23)
Network Homeless Coordinators (10N1-23)

Subject: Employees Should be Assigned to Assist with Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) Outreach, Access and Recovery (SOAR) (VAIQ 7772148)

1. The goal to end homelessness among Veterans remains a priority for the Department of Veterans Affairs (VA). To get there, communities are encouraged to explore all available resources from Federal, state, and local government as well as from the private sector. For example, existing non-VA resources, such as SSI/SSDI, can substantially assist the at-risk and homeless Veteran population by providing them with consistent income that often promotes permanent housing stability, self-sustainment, functional independence, and ongoing care for at-risk and homeless Veterans’ disabling conditions.

2. Because the SSI/SSDI application process is cumbersome, Veterans Health Administration (VHA) personnel in all homeless programs should be assigned to be trained in and utilize the SOAR program. SOAR is a Federal Intergency project with the SOAR Technical Assistance Center funded by the Substance Abuse and Mental Health Services Administration. SOAR is designed to increase access to SSI/SSDI benefits for eligible adults who are homeless or at risk of homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR is proven to increase the approval rate for those applying, as well as expediting the time it takes for individuals to obtain access to such financial benefits.
• Reaffirms importance of SOAR

• **Removes Previous Barrier**
  – VA staff can now sign SSA Form 1696.
    • Allows VA staff to share information with SSA on behalf of Veteran applicant, answer questions, and act as POC for SSA requests even without the Veteran being present.

• Veteran must also sign VA Form 10-5345, Request for and Authorization to Release Medical Records and Health Information.
The Need for SOAR

- Approximately 50% of Veterans experiencing homelessness have severe mental illness and/or health issues.

- Veterans experience high rates of TBI, PTSD, and MST which can affect employment and housing.

- SSVF FY15 Annual report states that 56% of Veterans served in SSVF had a disabling condition (twice the disability rate of the total U.S. Veteran population).
Integration of SOAR with SSVF

- **Do you use SOAR in your SSVF grant? (2016)**
  - Yes: 61%
  - No: 26%
  - No Response: 13%

- **Would SOAR be an added tool in your community?**
  - Yes: 84%
  - No: 3%
  - No Response: 14%
SOAR Overview

Jen Elder, SAMHSA SOAR TA Center, National Policy and Partnerships Coordinator
SSI/SSDI Outreach, Access & Recovery (SOAR)

- Focuses on people who are experiencing or at risk of homelessness
- 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 Works

The SOAR Model Increases SSI/SSDI Approval Rates for Eligible Individuals

- Average approval rate among the top 10 highest performing states using SOAR (2016): 84%
- Average national approval rate using SOAR (2016): 67%
- Average national approval rate without SOAR: 28%
- Homeless applicants approved for SSI/SSDI without assistance: 10-15%

Using SOAR | Without SOAR
31,356 persons experiencing or at risk for homelessness have been approved on initial application

67% approval rate overall, in an average of 101 days in 2016

- Compares to 10-15 percent for unassisted applications from people who are homeless and 28 percent for all applicants

- Top 10 states have served over 9,400 individuals, average 84% approval

- Appeals can take a year or more; many people give up and do not appeal
SSI & SSDI: The Basics

- SSA: Social Security Administration

- SSI: Supplemental Security Income; needs based; federal benefit rate is $735 per month in 2017; provides Medicaid in most states

- SSDI: Social Security Disability Insurance; amount depends on earnings put into SSA system; Medicare generally provided after 2 years of eligibility

- The disability determination process for both programs is the same
SSA Definition of Disability

- The definition of disability and application process is different for VA and SSA benefits

- 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 $1170/month in 2017)
  - 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 and earn $1170/month?
SSA Fast Track Programs

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 Online Course

https://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 SOAR TA Center
- 20 CEUs from NASW
- Class 1 of the course provides a “SOAR 101”
Get Involved with SOAR

https://soarworks.prainc.com/directory

- Find your SOAR TA Center Liaison
- Find your SOAR State Team Lead
- Connect with SOAR in your community
SSVF: SOAR Integration Toolkit

Jen Elder, SAMHSA SOAR TA Center, National Policy and Partnerships Coordinator
Using the SSVF/SOAR Toolkit

The Toolkit includes:

✓ Core concepts of Social Security disability benefits and the SOAR model
✓ Key strategies for integrating the SOAR model into community planning efforts and collaborating with community partners
✓ Approaches for assessing and prioritizing Veterans for SOAR assistance
✓ Methods of supporting dedicated SOAR Benefits Specialists within the SSVF grant
✓ Subcontract development with a local organization for SOAR assistance
SAMHSA SOAR TA Center

• SOAR Technical Assistance (TA) Center is funded by SAMHSA and operated by Policy Research Associates, Inc.

• Established in 2009

• Works with all 50 states and the DC to develop and refine action plans for implementing and expanding SOAR programs, at no cost to communities.

• TA is also available for U.S. territories that are interested in the SOAR model
Approach and Tracking

- Facilitate Strategic Planning
- Train leaders and SOAR Specialists
- Provide technical assistance
- Build sustainable systems
The goal is to find the **individualized, appropriate combination of income supports** that each Veteran family needs for permanent housing and pursue those opportunities while concurrently focusing on identifying a permanent housing unit or resource for the Veteran.
The first part of the toolkit is a great educational resource on Veteran eligibility for SSI/SSDI

- Includes SSA fast track programs
- Calculations on how VA benefits and/or employment affect SSI/SSDI

Host a “lunch and learn” for staff on SSI/SSDI and SOAR basics!
Grantee and Community Level Identification and Prioritization

• Key SSI/SSDI eligibility indicators for grantee-level assessments

• Advanced SOAR implementation: community-level identification and prioritization of Veterans
  – Coordinated entry systems
  – Common assessment tools
  – HMIS
  – Master/By-name lists

• Case coordination among community partners
Integrating SOAR into Community Planning Efforts

- Community planning and coordination is essential to end and prevent Veteran homelessness
- SOAR should be integrated into existing and planned community efforts
- Use community planning efforts to estimate the need for SOAR

Key Community Partnerships:
- Local and/or State SSA and DDS representatives
- Hospitals and clinics (both VA and non-VA)
- Street outreach teams
- Jail and prison social work or medical teams
- Housing providers
- Supported employment programs or Vocational Rehabilitation
- State and local SOAR leaders, and the SAMHSA SOAR TA Center
SSVF grantees are encouraged to train program staff using the SOAR Online Course

- Free, self-paced, comprehensive training program

The Toolkit contains examples for:

- Cost-sharing between grantees
- Setting caseload standards
- Requesting an SSVF Program Change
Subcontracting with a Local Organization for SOAR Assistance

- If not using SOAR in-house, grantees should partner with a local organization via:
  - Subcontracting relationship
  - MOU that clearly outlines referral process and expectations

Utilize the Toolkit guidance on:
- Locating an appropriate subcontractor
- Establishing expectations for SOAR subcontractors
- Setting subcontracting rates for SOAR assistance
- Establishing an MOU with a local agency
• Assessment to use *in collaboration with community partners* to identify:
  – the number of potentially eligible individuals in the service area
  – any existing SOAR resources that are being utilized to meet this need
  – the additional staffing that is required to meet the SOAR assistance needs
Next Steps

- **Review** the toolkit with SSVF program staff and community partners

- **Identify** local needs and resources

- **Establish** a plan for using the SOAR model with program staff or exploring subcontracting/MOU relationships

- **Reach out** to your SOAR State Lead and the SOAR TA Center for additional support

- **Learn** more about SOAR at:
  https://soarworks.prainc.com
Contact Us

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Additional Questions

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www.va.gov/HOMELESS/ssvf.asp

A recording of this presentation will be provided to webinar registrants and posted on the SSVF website.