SOAR
SSI/SSDI OUTREACH, ACCESS, AND RECOVERY

Sponsored by:
Substance Abuse and Mental Health Services Administration
U.S. Department of Health and Human Services

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Poll Questions

- Do you know if there is SOAR in your surrounding community?
- Have you been to a SOAR training?
- Do you assist with SSI/SSDI applications?
SOAR Technical Assistance Initiative

- SOAR: SSI/SSDI Outreach, Access and Recovery
- Sponsored by SAMHSA in collaboration with SSA
- No direct funding to states
- 50 states currently participate
- Helps States and communities increase access to SSI/SSDI through:
  - Collaboration and strategic planning
  - Training
  - Technical assistance
Why is SSI/SSDI Important?

SSA disability benefits can provide access to:

- Income
- Housing
- Health insurance
- Treatment
- Other supportive services
Myths About SSI and SSDI

- Everybody is denied the first time
- You will be denied 3 times before you are approved
- You need an attorney to be approved
- You can’t get benefits if you use alcohol or other drugs
- If you go to work, you’ll lose your health insurance and your benefit check
SSI and SSDI: The Basics

- **SSI**: Supplemental Security Income; needs based, federal benefit rate is $710 per month in 2013, plus available state supplement; usually comes with Medicaid

- **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 and DDS: Collaborative Effort

<table>
<thead>
<tr>
<th>SSA</th>
<th>DDS</th>
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<tbody>
<tr>
<td><strong>Social Security Administration</strong></td>
<td><strong>Disability Determination Services</strong></td>
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<tr>
<td>□ Initial contact point</td>
<td>□ State agency under contract with SSA</td>
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<tr>
<td>□ Processes non-medical eligibility criteria</td>
<td>□ Assesses medical evidence</td>
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<tr>
<td>□ Ensures necessary forms for medical evidence collection are complete</td>
<td>□ Makes a determination on disability</td>
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<td>□ Forwards medical releases and disability report to DDSD</td>
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<td>□ Later confirms decision</td>
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The Application Process

1. Individual establishes protective filing date
2. Individual files application
3. SSA determines non-medical eligibility
4. SSA sends medical information and releases to DDS, where a disability examiner is assigned
5. DDS processes claim and makes disability determination
6. Applicant’s folder is returned to initiating SSA office
7. SSA notifies applicant of decision by letter
SSA’s Criteria for Disability

1. Must have a medically determinable physical or mental impairment *that either meets or is equivalent to the listing of impairments that DDS considers*

2. Duration of the impairment must have lasted or be expected to last 12 months or more or result in death

3. Person must show significant functional problems caused by the medical impairment
The Problem

- Only about 10-15 percent of homeless adults are approved on initial application.
- Only about 29 percent of all applicants are approved on initial application.
- Appeals can take a year or longer.
- Many people give up and do not appeal.
What We Know Is Possible…

- As of June 2012, 48 states reported outcomes:
  - More than 15,025 individuals were approved for SSI/SSDI on initial application
  - 66% approval rate on average; many states are higher
  - In an average of 98 days

- In 2012 alone, SSI/SSDI brought at least $142 million into the state and local economies of these states

- $9,093 Medicaid reimbursement per SSI approved application
How Is This Model Different?

- Case managers actively assist applicants and develop evidence
- Focuses on the initial application – “Get it right the first time!”
- Avoids appeals and consultative exams whenever possible
- Focuses on documenting the disability
Critical Components for Success

1. Staff trained & available to assist with applications
2. Maintain contact with applicant
3. Become applicant’s representative
4. Obtain medical records, past and present
5. Collaborate with physicians
6. Electronic submission of information
7. Collaborate with DDS and SSA
8. Ensure quality of applications
9. Arrange for representative payees
10. Track and report outcomes
Why Is Access to SSI and SSDI Important for States and Localities?

- People experiencing homelessness are frequent users of expensive uncompensated health care
- Providers can recoup cost of this care from MediCal for up to 90 days retroactive to date of SSI eligibility
- States that fund health care for low income and/or disabled persons can save state dollars once MediCal is approved
- States and localities can recoup from SSA the cost of public assistance provided during the application process
- SSI, SSDI and MediCal bring federal dollars into states, localities and community programs
Use SOAR to Reach Broader Goals

- Housing
- Access to treatment and other services (employment, etc.)
- Decrease in adverse outcomes (incarceration and hospitalization)
- Advocacy
- Community investment
SOAR AND JUSTICE
INVOLVED PERSONS
Applying Prior to Release from Jail or Prison

- Individuals can apply for SSI benefits within 30 days of their release.
- Institutional pre-release agreements with SSA, may allow applications to be submitted up to 120 days prior to release.
- Agreements usually made between jail/SSA or DOC/SSA for all prisons.
- Payment starts after release.
If Incarcerated…

SSI
- Is suspended when a person is in a jail/prison for a full calendar month
- After 12 months, SSI benefits are terminated; must re-apply upon release

SSDI
- Continues while in jail/prison until convicted of a felony; after conviction benefits are suspended during incarceration
- Upon release – no need to reapply; just ask SSA to reinstate
- Legal proof of release is required to reinstate benefits
Successful Models: Collaborations with Corrections

- NY’s Sing Sing Prison:
  - Applications done prior to release by a community services agency
  - Same staff who does applications follow folks in community and access housing for them
  - 89% of 100 pre-release SSI applications approved in 59 days on average
  - 73% of approved received within one month of release; 31% approved prior to release
- In Oklahoma DOC, 90% approval on pre-release apps
Using SOAR for Jail Populations
Miami – Dade

- The Criminal Mental Health Project- Jail Diversion Programs for mentally ill offenders

Impacts:
- Reduction of jail overcrowding
- Access to housing with treatment & wrap around services
- Recidivism reduced from 70% to 22% for misdemeanor and to 5% for felony defendants

- Created specialized unit to expedite access to benefits
- Outcomes: 119 applications, 90% approval rate in 30 days
SOAR AND TRIBAL COMMUNITIES
SSI Eligibility: Income and Resources

- Income limit: $710/month (after exclusions)
- SSA counts most sources of income:
  - Wages, self-employment, or unemployment
  - Bureaus of Indian Affairs General Assistance
  - Social Security benefits and pensions
  - Child support
  - Per capita distributions that are not held in trust by the Secretary of the Interior, such as tribally managed gaming revenues
  - Food and shelter provided may also be counted
- Resource limits: $2,000-individual, $3,000-couple
SSI Income Exclusions

- The first $20/month of most income received
- The first $65/month of earnings from work and half the amount over $65
- The value of food stamps (SNAP)
- Most home energy assistance
- Certain exclusions on Indian Trust Fund payments
- 2010 Cobell Court Case
SSI Resource Exclusions

- Home applicant lives in and the land it is on
- Life insurance with a face value of $1,500 or less
- One vehicle used for transportation
- Burial spaces for applicant and immediate family
- Interests of the applicant or spouse in trust or restricted land
- Certain restricted, allotted Indian land
- Money held in a restricted Individual Indian Money (IIM) account
SSA Info for American Indians and Alaska Natives

- [www.socialsecurity.gov/aian/](http://www.socialsecurity.gov/aian/)
- Video Service Delivery locations
- Tribal Consultation and Coordination Plan
- Ticket to Work and Tribal Employment Networks
Conclusion

- Focusing on expediting benefits as a tool for reentry and recovery works!
- It's a win-win for the individual, for states, localities, and for community programs
- A major tool in recovery for persons with serious mental illnesses and other disabilities
For More Information

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