Enhancing Benefits Acquisition Efforts Through Collaboration

SOAR
SSI/SSDI Outreach, Access, and Recovery

SOAR Technical Assistance Initiative

- SOAR stands for SSI/SSDI Outreach, Access and Recovery

- Focus is on people who are homeless or at risk for homelessness

- Sponsored by the Substance Abuse and Mental Health Services Administration (SAMHSA) in collaboration with SSA since 2005

- All 50 states currently participate; no direct funding provided to states

- SOAR TA Center helps States and communities by providing technical assistance and training

SSI and SSDI: The Basics

- SSI: Supplemental Security Income; needs based; federal benefit rate is $710 per month in 2013; 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

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:
  - More than 15,000 individuals were approved for SSI/SSDI on initial application
  - **66 percent** approval rate
  - In an average of **98 days**
- SSI/SSDI brought nearly **$142 million** into state and local economies
- In 2012, seven states reported Medicaid reimbursement totaling **$1.5 million** - an average of **$5,256** in Medicaid reimbursement per person approved, as a result of SOAR
- Eight states reported public assistance reimbursement by SSA totaling **$1.1 million**

Building Community Collaborations

Affordable Care Act and SOAR

- Affordable Care Act brings expanded access to Medicaid

- SSI/SSDI remain as crucial income supports

- SOAR providers can continue their work and help with outreach for the Medicaid Expansion population

Until 2014 – What SOAR Can Do

- Although many of the individuals you currently serve will be eligible for Medicaid on 1/1/14, SOAR and SSI outreach is important now!

  - Getting people SSI and Medicaid before this expansion remains critical

  - The Medicaid program that currently exists may provide more benefits, especially in mental health, than the "new" "Essential Health Benefits" Medicaid that your State may adopt

2014 and Beyond

☐ In January 2014, individuals will not automatically be enrolled – they will still have to apply for Medicaid

☐ SOAR case managers will be especially poised to help individuals who are homeless to enroll

☐ Look at ways current systems can be modified to address Medicaid expansion efforts

☐ The Affordable Care Act only provides access to Medicaid

☐ Income supports, such as SSI and SSDI are critical for safe and stable housing, which in turn lead to better health outcomes

Get Involved with the ACA

- SOAR Case Managers can improve client health outcomes and be a part of Health Homes

- CMHCs can and should be key players in community SOAR efforts and ACA implementation

- Every State is in a different place – find out what your State Medicaid agency is doing on ACA implementation

- Talk to your State legislators and Medicaid agency staff about how SOAR can be a partner in health care reform efforts

- The national SAMHSA SOAR TA Center is prepared to help address the expanding need

Maryland Mental Hygiene Administration

Marian Bland, LCSW-C
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History of SOAR within Maryland

- Started in 2006 under Department of Human Resources (DHR)

- Initially two pilot sites: Baltimore City and Prince George's County

- In 2008 transferred to Maryland's Mental Hygiene Administration's Office of Special Needs Populations during DHR's reorganization

- MHA placed emphasis on establishing effective infrastructure and partnerships

- Grew from 2 pilot sites in 2006 to14 counties and Baltimore City by 2013

SOAR Sites Within Maryland

2009: Baltimore City and Prince George's County

2010: Anne Arundel, Montgomery, Wicomico Somerset, Worcester, Carroll Counties, Prison Social Workers

2011: St Mary's County, State Hospital Social Workers

2012: Baltimore, Fredrick, Harford and Washington Counties

2013: Cecil County

Building Effective Local Infrastructure

☐ Identify appropriate Local SOAR Team Lead

☐ Establish local Work Groups that continue to meet regularly

☐ Develop Action Plan to ensure successful implementation

☐ Screen potential training providers to ensure able to submit SOAR applications

☐ Provide structured follow up support after the two day SOAR training

Funding the SOAR Initiative

- Utilized additional PATH funds in 2009 and 2010
- Funded two positions at Health Care for the Homeless in Baltimore City
- One position at Prince George's County at DSS
- One SOAR Outreach Worker in Anne Arundel County
- One Data and Evaluation Coordinator

Building Effective State Infrastructure through Collaborative Partnerships

- ☐ Facilitate conference calls with Local Team Leads and participate in Local SOAR Work Groups

- ☐ Created Statewide TA team and have 10 active SOAR trainers who can offer on going support and hold follow up trainings and refresher training

- ☐ Facilitate quarterly State Planning Group with partners from SSA, DDS, DHR, HCH, DPSCS, VA, DORS, CSAs and other community providers

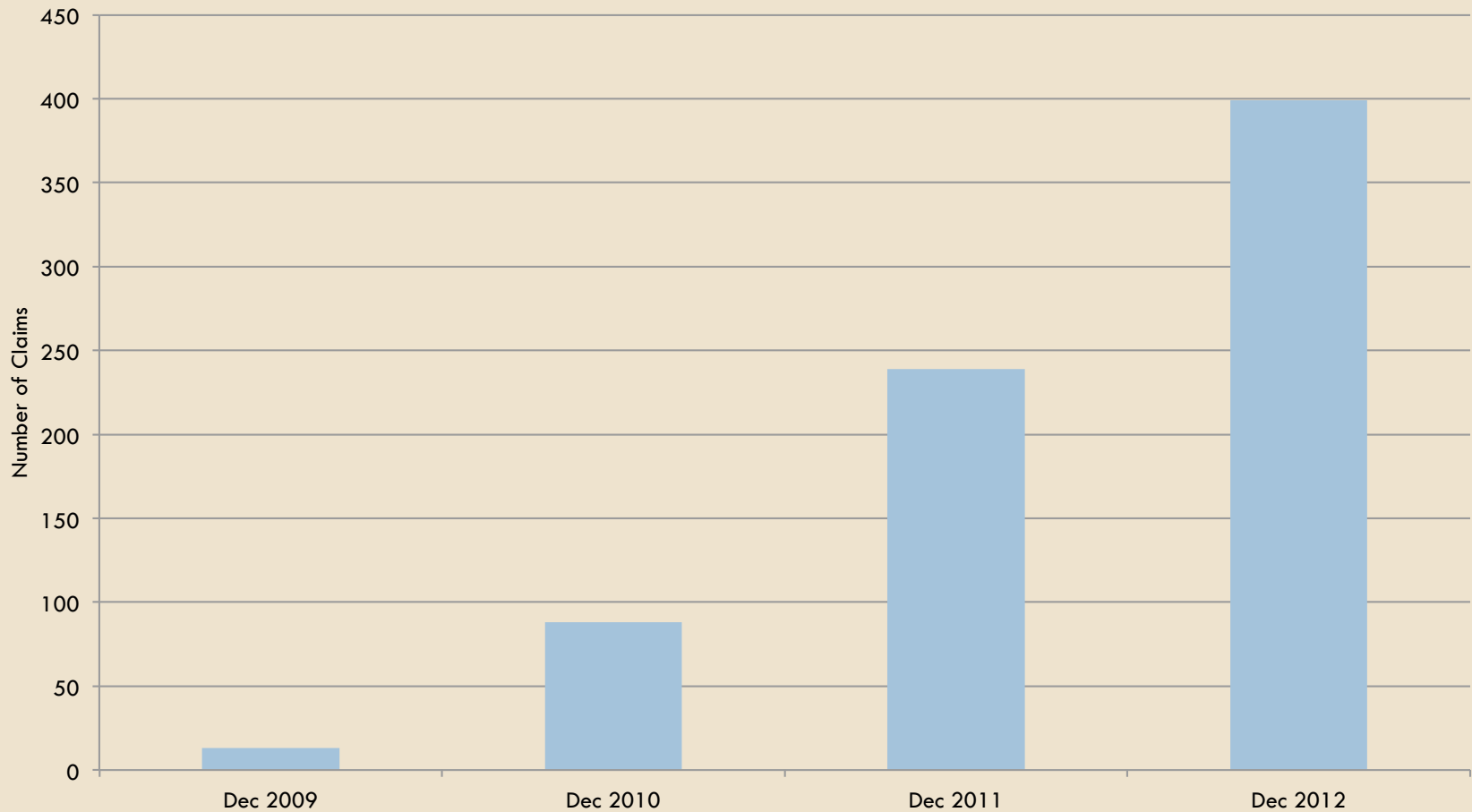- ☐ Develop Certification Program, SOAR e-newsletter and Best Practice Resource Guide

Certification Process

- Currently being piloted in Baltimore City and Montgomery County

- Two stage process: Provisional and Full

- Provisional: Attended SOAR training, had 1 SOAR claim approved, submit supporting documentation, complete Self Assessment form and participate in at least 1 SOAR related activity

- Full: further 3 SOAR claims and supporting documentation, self assessment form and participated in at least three SOAR related activities

Maryland's SOAR Outcomes: January 2013

- Over 410 applications submitted through SOAR

- Overall approval rate for state is 83% (341 applications approved)

- Average processing time for initial claims: 70 days

- Baltimore City has submitted 218 applications with an approval rate of 92%

- Newer sites: Montgomery County 90% approval rate with 39 applications submitted and Carroll County 91% approval rate with 11 applications submitted

- Over $2.75 million federal dollars are estimated to have been brought into the state through the SOAR program

Growth of SOAR Claims within Maryland

2012 SOAR Expansion

- Through funding from Alcohol Tax Appropriation a Homeless ID Project has been established for FY 2013

- Pays for state identification cards and birth certificates for individuals who are homeless and have a mental illness or co-occurring substance use disorder

- Built in dedicated SOAR Outreach/Case Management positions in each region that provides outreach, assistance with applying for SSI/SSDI using SOAR components, assistance with applying for other entitlements i.e. Primary Adult Care (PAC), Medicaid, food stamps, housing, employment, and other supports

- Dedicated staff received a 2-day SOAR training and will receive other training to enhance skills in engaging individuals, understanding entitlements, trauma, housing, etc. through SOAR TA team.

Benefit Acquisition at a Community Level

Nancy Vasquez, MPA
California Institute for Mental Health

Benefit Acquisition at a Local Level

- CIMH – California Institute for Mental Health

- Partnership with PRA – Policy Research Associates

- MHSA Funding – Mental Health Services Act

- Provide SOAR training and technical assistance for 3

  -5 communities in California

Benefit Acquisition at a Local Level

San Luis Obispo County, CA

- Led by Department of Social Services
- Have a community collaborative
- Need for improved collaboration with SSA & Mental Health Department

San Bernardino County, CA

- Led by the Department of Behavioral Health
- Staff and partner agencies now trained on SOAR method
- Developing a community initiative
- Local hospital will play a role in community effort

Benefit Acquisition at a Local Level

Santa Barbara County, CA

- Led by the Alcohol, Drug & Mental Health Department
- Staff and partner agencies now trained on SOAR method
- Used MHSA Innovation funds to develop their community initiative
- Hired Peer Recovery Specialists
- Built relationship with SSA
- Looking at the fiscal impact of a benefit acquisition program

Benefit Acquisition at a Local Level

Lessons Learned…

☐ SOAR Model must be "localized"

☐ A good assessment of the individual is necessary

☐ Organizational support is critical

☐ Collaboration is key

☐ Long term RECOVERY is the goal

☐ Use of the SOAR model in Health Care Reform

For more information:

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