SOAR (SSI/SSDI Outreach, Access, and Recovery) and Criminal Justice Overview

May 22-25, 2019
Disclaimer

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Overview and Agenda

• SOAR Overview
• SOAR CJ Initiatives
• SOAR CJ Implementation
• Next Steps and Resources
• Discussion
What is SOAR?

- A model for assisting eligible adults and children to apply for Social Security Administration (SSA) disability benefits
- For individuals who are experiencing or at risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities
- Sponsored by SAMHSA in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, DC currently participate
SOAR Implementation Requires Planning

Leadership

WHO WILL COMPLETE THE SOAR APPLICATIONS?

Resources

Initial Hearings

Community collaboration

Jail

Mental Health

Courts

Substance Use

Homelessness

Referrals
Social Security Disability Benefits

The Basics
Supplemental Security Income (SSI)

- Eligibility based on need: low income and resources; living arrangement
- Monthly amount based on Federal Benefit Rate: $771/month (2019)*
- Date of eligibility based on Protective Filing Date/Application Date
- Health insurance: Medicaid

Social Security Disability Insurance (SSDI)

- Eligibility based on insured status (FICA payments)
- Monthly amount based on earnings history
- Date of eligibility based on “date of onset” of disability, 5 month waiting period
- Health insurance: Medicare

*https://www.ssa.gov/ssi/text-general-ussi.htm
SSI/SSDI Eligibility: SSA’s Definition of Disability

**Medical Condition(s)**
- Diagnosis
- Documentation
- Duration

**Functional Impairment(s)**
- Severity
- Work
- Substantial Gainful Activity (SGA)
More Than Income

- Access to health care and housing
- Increased education and employment opportunities
- Decrease in incarcerations and hospitalizations

SSI/SSDI: One Brick in Foundation

A Foundation for Recovery and Resiliency
The SOAR Model

How does SOAR work?
What Makes SOAR Unique?

SOAR-trained case workers are the heroes!
Community Collaboration
SOAR Leadership Structure

**SOAR TA Center**
- Facilitates strategic planning meetings
- Conducts Leadership Academies, webinars, & learning communities
- Develops resources, including SOARWorks, the SOAR Online Course, and OAT
- Provides TA at all stages of SOAR implementation

**State Team Lead**
- Facilitates state steering committee
- Directs plans to grow & sustain statewide activities
- Serves as liaison to localities
- Maintains relationships with SSA & DDS
- Submits SOAR outcomes to the TA Center

**Local Lead**
- Facilitates local steering committee
- Directs local implementation plans
- Serves as liaison to localities
- Facilitates SOAR Online Course cohorts
- Conducts SOAR Online Course Review Sessions
- Ensures quality applications & reports outcomes

**Case Manager**
- Completes high-quality SSI & SSDI applications using the SOAR model
- Communicates with local SSA & DDS representatives
- Tracks application outcomes

*OAT: Online Application Tracking Program
*SSA: Social Security Administration
*DDS: Disability Determination Services
*TA: Technical Assistance
Oh, the support you will receive!

SOAR TA Center Activities and Support

- SOAR Online Course
- SOAR Leadership Academy
- SOAR Online Application Tracking (OAT) Program
- SOARWorks Library
- Individual Technical Assistance
- SOARing Over Lunch
- SOAR eNews
- Bi-Monthly Webinars
SOAR Works!

CUMULATIVE OUTCOMES

39,213 cumulative initial approvals
45,137 people receiving benefits because of SOAR
5,924 cumulative appeal approvals

*National SOAR outcomes as of June 30, 2018
https://soarworks.prainc.com/article/soar-outcomes-and-impact
2018 National SOAR Outcomes

*As compared to a 29% approval rate for all SSI/SSDI applicants nationwide

Impact on States and Communities

**TOP 10 STATES***

82% approval rate

Pennsylvania, Tennessee, Maryland, Arkansas, North Carolina, Washington, Oklahoma, District of Columbia, Virginia, New Mexico

*Inclusion: Cumulative approval rates on initial application, at least 300 cumulative decisions, at least 24 decisions in 2018 (2 per month), and a 2018 approval rate above the national average. Combined, these states had 14,089 decisions.

**FINANCIAL OUTCOMES**

- **$4,415**
  - average back payment received by individuals (2,941 cases reporting)

- **$4,548**
  - average Medicaid reimbursement per applicant (143 cases reporting)

- **$406M**
  - brought into the economies of the participating localities

- **17**
  - states received new SOAR funding in 2018

- **347**
  - full-time and part-time SOAR positions nationally

Address risks and needs from strengths-based approach

Reduce recidivism though risk reduction

Reduce incarcerations/justice interventions
Myth-Busting!

• Prior history of incarceration alone does not make someone (in)eligible for benefits

• A person can apply for benefits while incarcerated

• Warrants (other than escape) should not hinder a person from applying or receiving payment
Receiving Benefits: Supplemental Security Income (SSI)

<table>
<thead>
<tr>
<th>Incarceration Time</th>
<th>Effect on Benefits</th>
<th>Action Needed Upon Release</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 1 full calendar month</td>
<td>No effect</td>
<td>N/A</td>
</tr>
<tr>
<td>1 - 12 calendar months</td>
<td>Suspended</td>
<td>Can be reinstated upon release</td>
</tr>
<tr>
<td>12+ consecutive calendar months</td>
<td>Terminated</td>
<td>Must reapply*</td>
</tr>
</tbody>
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*As a general rule, reapplication can be made 30 days prior to expected release date but benefits cannot begin until release. With a pre-release agreement, this time can be extended to 120 days prior to release.*
# Receiving Benefits: Social Security Disability Insurance (SSDI)

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</tr>
<tr>
<td>&gt; 30 days*</td>
<td>Suspended</td>
<td>Can be reinstated upon release</td>
</tr>
<tr>
<td>*convicted and confined</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Recipients are eligible to continue receiving their benefits until they are convicted of a criminal offense and confined to a penal institution for more than 30 continuous days.*
SOAR Implementation in Criminal Justice Settings

- Maricopa County Correctional Health Services
- Burrell, Inc
- Elgin Police Department
- Consumer Health Coalition
- Mecklenburg County Criminal Justice Services
- The Kent Center

2017

- Nework Community Solutions
- Delaware Dept. of Corrections
- Mississippi Dept. of Corrections
- Martin Girls Academy
- Directions for Living

2018
SOAR Criminal Justice Outcomes

Cumulative total of SOAR-assisted initial SSI/SSDI applications for people residing in correctional facilities:

- **319**

Average days to decision:

- **79 days**

Approval rate:

- **76%**

*Data accessed from the SOAR Online Application (OAT) tracking system on August 1, 2018*
The areas of criminal justice, behavioral health, and homelessness share the same clientele.

No single program can address every need.

Collaboration is key to successful reentry.
• Direct access to incarcerated individuals (jail/prison)
• Ability to obtain and interpret prison records
• Begin application process prior to release (SSA Agreement)
• Re-Start previously granted benefits
• Obtain Court-Order and conduct required psychological testing
• Outcomes: Awarded SSI/SSDI benefits, obtain Medicaid, stable housing, access to medical/MH services, community supports
SOAR and In-Reach Collaboration: Sing Sing CORP

- Applications done prior to release from Sing Sing prison by a SOAR trained community services agency
- Same staff who do applications follow individuals in community and access housing for them
- 90% of 130 pre-release SSI applications approved in 59 days on average
- 73% of approved within one month of release; 31% approved prior to release
SOAR and Jail Collaboration: Davidson County

• Davidson County, Tennessee SOAR DCSO (Department of Corrections/Sheriff’s Office)

• Collaboration through the Mayor’s Office of Innovation, Sheriff’s Office, and Metro Social Services

• Initiative within the Jail was established July 2014

• Sole mission of SOAR at DCSO:
  • Assist incarcerated individuals with a severe and persistent mental illness who are without income and/or experiencing homelessness to re-enter into society

• Outcomes: 89% of applications approved in average of 48 days
SOAR and Prison Collaboration: Oklahoma

- Funded by the Oklahoma Department of Mental Health and Substance Abuse Services

- Oklahoma Department of Corrections staff trained to assist with accessing public benefits, e.g. SSI/SSDI

- Built and nurtured relationships with state and federal partners
  - Held regular meetings with all stakeholders

- Collaboration on 4 federal re-entry grants
  - These grants target people with co-occurring disorders
  - Also includes applying for public benefits when applicable

- Over the past 11 years, approval rates have been >80%
Criminal Justice Services-Forensic Evaluations Unit

- Mecklenburg County, NC (2016 SAMHSA SOAR CJ TA Award)
- 6 SOAR Trained staff at Criminal Justice Services (Forensic Evaluations Unit, Reentry Services, Treatment Court)
- 2 SOAR Trained staff at Jail Inmate Services
- 2 SOAR Trained Social Workers at the Public Defender’s Office
- All working in collaboration with SOAR trained community partners
Teamwork Helps Reentry Work
Choose your curriculum!

SS/SSDI Outreach, Access, and Recovery (SOAR) Online Course: Adult Curriculum

The SOAR Online Course: Adult Curriculum trains case managers to assist adults (age 18+) who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for SSI/SSDI.

SS/SSDI Outreach, Access, and Recovery (SOAR) Online Course: Child Curriculum

The SOAR Online Course: Child Curriculum trains case managers to assist children (under age 18) who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for SSI.
Benefits of the SOAR Online Course

- Standardized training are provided across all geographic areas.
- SOAR Leaders can coordinate follow-up training and support.
- 20 National Association of Social Workers (NASW) CEUs available.
- Courses are FREE, web-based, and self-guided.
SOAR Online Course: Articles and Practice Case

Articles and Content

What is SOAR?

SOAR (Self-Selection, Outreach, Access, Recovery) is a program designed to increase access to Social Security Administration (SSA) disability benefits for eligible individuals who are experiencing or at risk of homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder.

Classified as being homeless if:

1. Rented or owned housing, or living without pay in any public or private shelter, or a residence where the primary income is not from the sale of goods or services.
2. A place not normally used for sleeping by most individuals, such as a car, bus, or other vehicle.
3. A residence that does not provide adequate protection from weather or other hazards.

Many people with disabilities who experience homelessness or are at risk of homelessness (e.g., those leaving the criminal justice system or experiencing conflict with family or are living in a situation of domestic violence) struggle to access the resources they need. Many suffer from disabling mental illnesses, co-occurring substance use, trauma, and medical issues that impair their ability to work. The path to recovery can be unnecessarily challenging when one is constantly struggling to meet basic needs. Having income and health care benefits is often a critical first step on the road to recovery.

The Social Security Administration (SSA) has two programs that can provide assistance:

1. Supplemental Security Income (SSI), a needs-based program, for individuals who are blind, disabled, or elderly, with low income/resources.
2. Social Security Disability Insurance (SSDI) for blind or disabled individuals who are insured through their employer and have contributed to the Social Security Trust Fund.

In most states, Medicaid and Medicare health insurance accompany these benefits for eligible individuals.

Circumstance can impede access to income and health care benefits:

- Individuals who do not have a permanent, reliable address
- People who are experiencing homelessness often have sparse medical care, making it difficult to access medical records or document disability
- Symptoms can interfere with cognitive functioning, making it difficult to manage complex systems
- SOAR helps to overcome these barriers

SOAR in SOAR Outreach, Access, and Recovery

SOAR is a Best Practice supported by the Substance Abuse and Mental Health Services Administration (SAMHSA).

- Designed to help states increase access to SOAR for eligible adults who are experiencing or at risk of homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder.

Practice Case

Practice Case: Meet Your Client

Welcome to the SOAR Online Course Practice Case!

Practice Case is a tool to help you apply what you learn in this course to your own practice. By completing the Practice Case and submitting your responses, you can gain valuable experience and feedback on your understanding and application of the course content.

Tasks for this Case:

1. **Phone Call**
   - Call Michael at (555) 123-4567 to review his case.
   - Use your judgment to determine the best approach for connecting Michael with the appropriate services.

2. **Letter**
   - Write a letter to Michael summarizing your conversation and outlining the steps he can take to access services.

3. **Email**
   - Send an email to Michael summarizing your conversation and outlining the steps he can take to access services.

Practice Case Materials:

- Practice Case Task Guide.pdf
- SSA Form Guide.pdf
- Practice Case MEB Type.pdf
- MBH Interview Guide and Template.docx
- SSA-1603-Appointment of Representative.pdf

Practice Case Study: Make Part 1

- SOAR Case Study - Make Part 1.pdf
- SSA Form Guide.pdf
SOAR and Criminal Justice Resources

https://soarworks.prainc.com/topics/criminal-justice

- Infographic
- FAQs
- Sample tools
- Issue Brief
Learn more about SOAR: https://soarworks.prainc.com/

Get in touch with your SAMHSA SOAR TA Center liaison: https://soarworks.prainc.com/content/contact-us

Reach out to your local or state SOAR leads: https://soarworks.prainc.com/directory

SOAR TA Center liaison, Dazara Ware dware@prainc.com
518-439-7415 x 5260

Register for the SOAR Online Course
SAMHSA’s mission is to reduce the impact of substance abuse and mental illness on America’s communities.

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) ● 1-800-487-4889 (TDD)