OFFICE OF SUBSTANCE ABUSE
AND MENTAL HEALTH
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Guidance 9
Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI)
Outreach, Access, and Recovery (SOAR)

Contract Reference: *Sections A-1.1 and C-1.2.3*

Frequency: Ongoing

Due Date: Monthly data by the 18th of each month following services

Discussion: The purpose of this document is to provide guidance for the implementation and administration of the evidence-based SOAR model, the Managing Entity shall require that Network Service Providers adhere to the service delivery and reporting requirements herein.

I. GOAL

The evidence-based SOAR model is designed to increase access to SSI/SSDI for eligible adults and children with mental illnesses who are experiencing or at risk of homelessness. The goal of the SOAR project is to advance resiliency and recovery for individuals and families through the income and health care benefits that SSI/SSDI provides. The Social Security Administration (SSA) administers two programs that provide income benefits to those who suffer from disabling conditions that impede their functioning and impact their ability to work.

- **Supplemental Security Income (SSI):** Needs-based program for adults or children who are blind, disabled, or elderly, with low income/resources
    o Florida Medicaid automatically accompany SSI benefits.
- **Social Security Disability Insurance (SSDI):** Program for blind or disabled adults who are insured through employee and employer contributions to the Social Security Trust Fund

Economic stability is a social determinant of health and poverty correlates with barriers to health care and stable housing.[1] Individuals experiencing or at risk of homelessness and living with disabling mental illnesses, co-occurring substance use, trauma, and/or other medical issues face multiple challenges which can impede access to the income and health care benefits that SSI/SSDI provides. SOAR works to overcome these barriers. Case Workers take the web-based SOAR Online Course to learn how to effectively gather documentation and submit a complete and thorough SSI/SSDI application packet to SSA. SOAR caseworkers collaborate with stakeholders and agree on a SOAR Process which establishes protocols for the submission and processing of SSI/SSDI applications. The State & Local SOAR Team Leaders support SOAR-trained case managers and keep stakeholders engaged.

II. Eligibility

SOAR assistance may be provided to individuals who:

- Adult or child;
- Receiving substance abuse and mental health-funded services; and
- Experiencing or at risk of homelessness

III. Managing Entity Responsibilities

The Managing Entity shall:

1. Establish a local planning team that includes representatives from the local Social Security Administration, the Florida Department of Health Division of Disability Determinations, Network Service Providers, Continuums of Care, and other stakeholders serving this population. Local planning team activity, includes:

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[1] U.S. Department of Health and Human Services, Office of Disease Prevention and Health Promotion. (2023), Retrieved March 3, 2023, from https://health.gov/healthypeople/priority-areas/social-determinants-health

a. Develop an action plan to implement or expand the SOAR process consistent with the state initiative;

b. Convene regular local planning team meetings to explore and identify strategies for ongoing funding and sustainability;

c. Disseminate minutes of meetings to the local planning team and the STL;

d. Report implementation progress and challenges to the STL and the statewide SOAR Stakeholders Committee.

e. Coordinate and follow-up on implementation of the action plan through its Network Service Providers.

2. Participate in meetings and activities of the SOAR Stakeholders Committee.

3. Require specifically identified Network Service Providers to achieve the following:

a. Annually complete a minimum of 25 SOAR-assisted applications for each full-time dedicated SOAR specialist, or achieve a negotiated minimum quarterly target for completed SSI/SSDI applications for each SOAR specialist that is determined and agreed on by both the Managing Entity and Network Service Provider;

b. Complete all SSI/SSDI applications within 60 days of the protective filing date, defined as the time when an applicant first contacts the Social Security Administration indicating an intent to file for SSI/SSDI;

c. Complete the appeal process for those applications which may be denied upon initial review when applicable;

d. Enter 100% of SSI/SSDI application data and outcomes into the SOAR Online Application Tracking (OAT) program available at: https://soartrack.samhsa.gov/;

e. Assign a staff member responsible for data submission quality control to ensure 100% of the following critical components are completed and reflected in OAT:

- Completed SSA1696

- Medical Records Collected

- Medical Summary Report

f. Maintain a minimum completion rate of 75% of applications are completed and submitted to SSA within 60 days of the Protective Filing Date; and

g. Maintain a minimum rate of 65% of submitted applications are approved on the initial submission.

4. Provide, directly or through subcontract designation, a SOAR local lead responsible to monitor and ensure accurate data input by Network Service Providers in the (OAT) program.

5. Annually coordinate a SOAR group training for a minimum of 2 groups of at least 5 staff from its Network Service Providers using materials by https://soarworks.samhsa.gov/. Notice of the training shall be provided to the STL and Network Provider Staff at least two weeks in advance of the training.

IV. SOAR Training

The Adult/Child SOAR Online Course is the only acceptable training in Florida for new SOAR case workers, case workers whose initial SOAR training pre-dated the availability of the SOAR Online Course, or refresher trainings for case workers who have not completed SOAR-assisted applications in two years or more. The SOAR Online Courses are available at: https://soarworks.samhsa.gov/