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, A.1.1.2, C-1.2.3, and C1.2.6*

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 outlined herein.

I.   Goal

The evidence-based SOAR model is designed to increase access to SSI/SSDI for eligible adults and children with mental health conditions who are experiencing, or at risk of, homelessness. The goal of the SOAR project is to promote resilience and recovery by connecting individuals and families to critical income and health care benefits. These benefits are provided through two programs administered by the Social Security Administration (SSA), which offer financial assistance to individuals whose   disabling conditions limit their daily functioning and ability to work.

- **Supplemental Security Income (SSI):** Needs-based program for adults or children who are blind, disabled, or elderly, with low income/resources
  - 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 key domain of health and poverty is closely linked to limited access to health care and stable housing.[1] Individuals experiencing or at risk of homelessness, living with serious mental illnesses, co-occurring substance use, trauma, or other medical conditions, often face significant barriers accessing the income and health care benefits available through SSI/SSDI.

Through the SOAR Online course, case workers receive training on how to collect essential documentation and prepare comprehensive SSI/SSDI application packets for submission to the Social Security Administration. SOAR case workers also collaborate with local stakeholders to develop a coordinated SOAR process, which outlines protocols for submitting and processing applications. The SOAR State Team Lead (STL) and Local SOAR Team Leaders provide ongoing support to trained case managers and help maintain active engagement among community partners.

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

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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

Effective date: July 1,2025

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. The responsibilities of the local planning team include:

   a. Develop an action plan to implement or expand the SOAR process in alignment with the statewide initiative.

   b. Convene regular meetings to identify strategies for ongoing funding and sustainability.

   c. Disseminate meeting minutes to all the local planning team members and the STL.

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

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

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

3. Require specifically designated Network Service Providers to meet the following performance expectations:

   a. Annually complete a minimum of 25 SOAR-assisted applications for each full-time, dedicated SOAR specialist, or meet a mutually agreed-upon quarterly target established by the Managing Entity and Network Service Provider.

   b. Submit all SSI/SSDI applications within 60 days of the protective filing date. The date an applicant first contacts the Social Security Administration to express intent to apply.

   c. Complete the appeal process for applications that are denied upon initial review, when applicable.

   d. Ensure100% of SSI/SSDI application data and outcomes are entered into the SOAR Online Application Tracking (OAT) program available at: https://soartrack.samhsa.gov/.

   e. Designate a staff member responsible for data submission quality control to verify that the following critical components are accurately completed and recorded in OAT:

      - Completed SSA1696 (Appointment of Representative)

      - Medical Records Collected

      - Medical Summary Report (MSR)

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

   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/