

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 accompanies 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.

Staff designated to provide SSI/SSDI application assistance services must receive training through state-approved, locally developed, or comparable training resources. Staff must be able to collect required documentation, complete and submit application materials, and coordinate with community partners to support the application process. Managing Entities must ensure access to ongoing support, program oversight, and collaboration among stakeholders to support quality implementation and program fidelity.

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

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>

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 State Team Lead (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. Ensure SSI/SSDI application activities and outcomes are tracked and reported in accordance with contract requirements.
 - e. Ensure quality control processes are in place to verify required SSI/SSDI application documentation and reporting requirements are completed and maintained by Network Service Providers consistent with local operational practices. This includes: :
 - 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. Designate a staff member responsible for monitoring data quality and ensuring accurate and timely data entry by Network Service Providers into a Managing Entity-approved data tracking system.
5. Annually coordinate training for Network Service Provider staff on SSI/SSDI application assistance using state-approved, locally developed, or comparable training resources. Training shall be provided to a minimum number of staff, as determined by the Managing Entity. 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

Case workers providing SSI/SSDI application assistance must complete training through Managing Entity-approved or state-approved training providers. Approved training must cover collection of required documentation, completion

and submission of SSI/SSDI applications, and coordination with the Social Security Administration.

The Department/Managing Entity maintains a list of approved training providers.