

**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 18<sup>th</sup> of each month following services

**Discussion:**            SOAR is a national project funded by the Substance Abuse and Mental Health Service Administration (SAMHSA) that is designed to increase access to SSI/SSDI for eligible adults and children with mental illnesses who are homeless or at risk of homelessness.

The Managing Entity shall ensure that Network Service Providers are implementing the SOAR process within the contractually defined geographic area. Network Service Providers must have specifically identified case managers trained in and utilizing the SOAR model. The Office of SAMH has a SOAR State Team Lead (STL) available to provide technical assistance in collaboration with the SAMHSA-funded SOAR Technical Assistance Center. The Office of SAMH has established a SOAR Stakeholders Committee to serve as the required State Planning Team for implementation, expansion and strategic planning on SOAR initiatives.

**A SOAR Implementation:**

The goal of the SOAR process is to reduce or eliminate homelessness by reducing financial barriers that impede recovery. The SOAR process assists a defined target population: adults and children with mental illnesses or co-occurring disorders who are homeless or at risk of homelessness. The process assists these individuals by increasing access to SSI/SSDI benefits.

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 stakeholders serving this population.
- 2 Facilitate local planning team activity, including:
  - 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.
- 3 Participate in meetings and activities of the SOAR Stakeholders Committee.
- 4 Require specifically identified Network Service Providers which serve the target population to:
  - a. Complete SSI/SSDI applications using the SOAR process through case managers trained using one of the options identified in Section B;
  - 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. If applicable, complete the appeal process for those applications which may be denied upon initial review;
  - d. Enter all SSI/SSDI application data into the SOAR Online Application Tracking (OAT) program available at: <https://soartrack.prainc.com/login.php>; and
  - e. Assign a Network Service Provider staff member responsible for data submission quality control;
  - f. Maintain a minimum completion rate of 75% of applications are completed and submitted within 60 days of the Protective Filing Date.
  - g. Maintain a minimum rate of 65% of submitted applications are approved on the initial submission; and
  - h. Achieve a negotiated minimum quarterly target for completed SSI/SSDI applications that is determined and agreed on by both parties.
- 5 Provide, directly or through subcontract designation, a local lead responsible to monitor and ensure accurate data input by Network Service Providers in the (OAT) program.

## **B SOAR Training**

- 1 The Managing Entity shall encourage its Network Service Providers to implement individual SOAR training to specifically identify case managers and agency leads using the SOAR Online Course, available at: <https://soarworks.prainc.com/course/ssissdi-outreach-access-and-recovery-soar-online-training>
- 2 The Managing Entity shall annually coordinate SOAR group training to a minimum of 2 groups of at least 5 staff from its Network Service Providers using materials by <https://soarworks.prainc.com/>.
- 3 The Managing Entity shall require SOAR training using the SOAR Online Course to individuals whose initial SOAR training pre-dated the availability of the SOAR Online Course and refresher trainings using the SOAR Online Course once every four years for all SOAR staff.
- 4 The Managing Entity shall inform the STL of planned SOAR group training events two weeks in advance of the training.