Findings from a Study of the SSI/SSDI Outreach, Access, and Recovery (SOAR) Initiative

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Scope of the Problem

- More than 1 percent of the U.S. population is homeless.
- Disability prevalence among homeless adults
  - 77 percent report a chronic health condition
  - 22 percent report a serious, persistent mental illness
  - 67 percent report having received a mental health diagnosis in their lifetime

Sources: Burt 2001; O'Toole et al. 2002; U.S. Conference of Mayors 2004; Goering et al. 2002; North et al. 2004.

Scope of the Problem (cont'd.)

- **Challenges related to the SSI/SSDI application process**
  - **No stable address**
  - **Limited functioning can affect ability to keep appointments**
  - **No usual source of medical care**
  - **Fragile social support networks**

What Is SOAR?

- **Strategic planning and technical assistance for states**
  - **Application policies and procedures**
  - **Promotion of cross-agency communication and relationships**
- **Training for front-line staff to support clients throughout the application process**
  - **Stepping Stones to Recovery curriculum**
  - **Train-the-trainer model**
- **Follow-up support and monitoring**

Critical Components of SOAR Training

- Becoming an applicant's authorized representative (to facilitate communication with SSA and DDS)
- Obtaining medical records with proper consent
- Writing a report about the applicant's functionality and having a medical provider sign the report (which deems it medical evidence)

Critical Components of SOAR Training (cont'd.)

- Collaborating with medical providers to obtain assessments (and thereby avoid consultative exams)
- Conducting a quality review of the application before submission

Study Objectives

- Provide a comprehensive description of SOAR
- Examine outputs and short-term outcomes of SOAR
- Assess factors associated with successful implementation
- Describe how SOAR could be improved

Outputs

Leadership and Commitment

- Strong leadership
- Supervisory support
- Alignment of SOAR with core job functions
- Staff turnover

Relationship Building

- **SSA/DDS involvement**
  - Participating in strategic planning and trainings
  - Flagging SOAR applications
  - Designating staff to process SOAR applications
  - Providing feedback on application quality
- **Stakeholder communication trends**
  - States with no outcomes: little communication
  - States with positive outcomes: existing communication strengthened during SOAR

In-State Trainings

- **95 percent of participants reported that the training—**
  - **Improved their understanding of the SSI/SSDI application process**
  - **Would help them assist clients with applications**
- **Participants' knowledge of the application process improved by 22 percentage points for one group of states and by 28 percentage points for another (statistically significant, n = 180 and 207, p < .001)**

Case Managers' Use of SOAR Skills

- Some case managers reported never using skills taught during the SOAR training
- Organizations with one or more dedicated SOAR staff members and supervisory support had the best results

Short-Term Outcomes

Application Outcomes

State	Number of Applications	Percentage of Applications Approved	Processing Time
PA	96	75–100%	10 days
UT	412	75–85%	90 days
MA	275	25–50%	90 days
VA	123	25–50%	50 days
OH	Unknown	Unknown	Unknown
NJ	Unknown	Unknown	Unknown

System-Level Outcomes

- Cost recovery of General Assistance dollars
  - Massachusetts
  - Utah
- Institutionalized roles in benefits acquisition
  - Formalized staff responsibilities
  - Incorporated SOAR into 10-year plan to end homelessness
- Application of SOAR to other populations
  - Pennsylvania: TANF clients
  - Ohio: applicants for other benefit programs

Facilitating Implementation Success

	State 1	State 2	State 3	State 4	State 5	State 6
Strong and consistent leadership	X	X				
Agency-level support for SOAR	X	X	X	X		
Engagement of SSA and DDS	X	X	X	X		
Structured interagency communication	X	X				
Identification of qualified trainers	X	X	X	X	X	
Supervisory support for case managers and/or dedicated benefits specialists	X	X	X	X		
Targeted implementation	X	X				
Outcome data collection	X	X	X	X		

Note: States are organized based on how successfully they implemented SOAR, with State 1 struggling the least to implement the program and State 6 struggling the most.

Next Steps:
A Follow-Up Study

For More Information

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- **To view the report on the SOAR study:**
  - http://www.DisabilityPolicyResearch.org
  - http://www.mathematica-mpr.com/Health/soar.asp