



# North Carolina Coalition

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## to End Homelessness

**NC SOAR: SSI/SSDI, Outreach, Access and Recovery**

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### SOAR Frequently Asked Questions

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We are having great success with the SOAR program in North Carolina. Agencies and communities often have questions about what SOAR is and how to get started on completing SOAR applications. NCCEH has put together answers to commonly asked questions below. If you still have questions after reading over this document, please contact Emily Carmody at NCCEH at [soar@ncceh.org](mailto:soar@ncceh.org) or 919-755-4393.

Topics included in this FAQ:

- General SOAR Information
- SOAR Caseworker Training and Certification
- Dedicated SOAR Caseworker Positions
- NCCEH and NC SOAR
- Other SOAR Questions

#### **General SOAR Information**

##### ***What is SOAR? How can it help the people I serve?***

SOAR is a program sponsored by SAMHSA (Substance Abuse and Mental Health Services Administration) to increase access to Social Security Administration (SSA) disability benefits for people who are homeless and at risk of homelessness. SSA disability benefits include SSI (Supplemental Security Income) and SSDI (Social Security Disability Insurance). These programs both include monthly income benefits and healthcare benefits. SSI recipients are eligible for Medicaid benefits and SSDI recipients receive Medicare benefits.

NCCEH serves as the state lead for SOAR in North Carolina. NCCEH offers trainings and ongoing technical support for caseworkers as they apply for SSI/SSDI benefits in a more effective and efficient manner. NCCEH also helps communities in NC educate key stakeholders about SSA benefits and create collaborations and systems change to expedite SSI/SSDI applications for individuals who are homeless or at risk of homelessness.

##### ***What does SOAR stand for?***

SSI/SSDI Outreach, Access, and Recovery.

### ***How is SOAR different than the usual application process for SSI/SSDI benefits?***

SOAR recognizes that the application process for SSI/SSDI benefits poses challenges for individuals who have a disability and are dealing with the crisis of homelessness. Caseworkers want to help, but are often misinformed, intimidated, or frustrated by the process of applying for SSI/SSDI benefits. Often, cases are trapped in an appeals process that can take up to two years. We know that this is time homeless applicants do not have. SOAR focusses on getting the application right the first time to avoid lengthy appeals.

In order to improve applications, SOAR educates caseworkers about how SSA and Disability Determination Services (DDS) determine if an individual qualifies for disability benefits and what information caseworkers can provide to help SSA and DDS make accurate decisions. The SOAR model asks caseworkers to take a more active role in communicating with SSA and DDS during the application process. Caseworkers also gather medical information and personal accounts about the applicant's disabling condition in order to write a detailed report for SSA. The average SOAR case requires more effort during the initial application process (an average 35-40 hours per case), but results in more approvals of initial applications in less time when compared to non-SOAR applications.

### ***How can I find out more information about SOAR?***

To find out more about SOAR in North Carolina, please visit NCCEH's website at [www.ncceh.org/ncsoar/](http://www.ncceh.org/ncsoar/). There are pages with resources for communities and caseworkers as well as information about upcoming trainings in NC.

To learn more general information about the SOAR model, please visit the national SOAR website at <http://soarworks.prainc.com/>.

### ***As an Executive Director, what should I know about SOAR?***

The SOAR model is a great way for your staff to connect individuals to SSI/SSDI benefits effectively and efficiently. The income and health care benefits that come with SSI/SSDI benefits mean more access for your agency's consumers to housing, medical, mental health, and other services in the community. With stable housing and basic needs met, individuals benefit more from services provided. However, it is important to note that SOAR requires a time commitment from your agency. To accommodate this need, many agencies have created dedicated SOAR caseworker positions that complete SOAR applications for agencies on a full-time basis. (See more information about dedicated SOAR caseworker positions on page 5 of this document.)

### ***How does SOAR benefit individuals?***

Many disabled individuals are caught in a cycle of inpatient hospital stays, episodes of homelessness, and incarcerations. In order to break this cycle, SOAR connects these individuals to SSI/SSDI income and healthcare benefits quickly and efficiently. With income and healthcare, individuals gain access to housing and services that allow them to stabilize in the community and break the cycle of homelessness.

### ***How does SOAR benefit my community?***

Communities that have dedicated SOAR caseworker positions and an open community referral process see the most benefits from SOAR. Communities benefit from SOAR because individuals with SSI/SSDI income and healthcare benefits can be housed and stabilized in outpatient treatment. Once connected to housing and treatment, these individuals reduce their use of expensive crisis services, hospitals, and jails.

Furthermore, SSI/SSDI income benefits the community because it is used to pay for local goods and services. Since June 2010, SOAR has brought over \$7.5 million into the state of North Carolina and its local economies, including back pay awarded to applicants and the first year of annual benefits. These benefits allow individuals to contribute to their community by paying rent, buying goods, and using services. You can find out how much NC SOAR has contributed to your local economy through NC SOAR County Quarterly Reports: <http://www.ncceh.org/community/>.

### ***How do I connect someone to a SOAR trained caseworker?***

If you are working with someone who is homeless or at risk of homelessness who you believe to have a disabling condition and you would like a referral to a SOAR trained caseworker, please contact Emily Carmody at [soar@ncceh.org](mailto:soar@ncceh.org) or 919-755-4393. NCCEH can provide contact information for SOAR trained individuals by county. Not all counties in North Carolina have SOAR trained caseworkers. Please note the contact information is based on information provided by individuals during the SOAR training registration process and, while NCCEH staff strives to update records when possible, not all contact information may be current.

### ***How do I start a SOAR community project?***

SOAR is best implemented as a community effort. SOAR cases often require caseworkers to advocate for systemic changes in healthcare, housing, and mental health systems. Caseworkers are aided by having a group of key stakeholders who meet regularly in order to support the SOAR project's goals.

Many communities in North Carolina have developed work groups to support SOAR in their community. These groups often involve SOAR caseworkers, homeless and housing service agencies, LME/MCO staff, local hospital staff, local SSA office staff, mental health providers and other healthcare providers. Projects for these groups involve educating systems about SSI/SSDI benefits, streamlining resources to support SOAR applications, and developing a process for reviewing community SOAR outcomes and addressing barriers that affect these outcomes.

NCCEH has developed a SOAR Community Certification process in order to aid community groups in developing a supportive infrastructure for SOAR cases. You can find information about the SOAR Community Certification process on NCCEH's website: <http://www.ncceh.org/community/>.

### ***How does my community become a Certified SOAR Community?***

NCCEH offers a SOAR Community Certification process to help guide communities in developing an infrastructure that supports SOAR cases and ongoing projects to link homeless individuals to mainstream benefits.

The SOAR Community Certification process is divided into three levels: Bronze, Silver, and Gold. Each level is designed to build on the work of the previous one, and each has defined tasks and deliverables for the community to provide to NCCEH. The steps are designed to educate and engage key community stakeholders. To learn more about the SOAR Community Certification process, please visit NCCEH's website: <http://www.ncceh.org/community/>.

### **SOAR Caseworker Training and Certification**

#### ***How do I get started with completing SOAR applications?***

In order to be able to complete SOAR applications, you must attend a two-day SOAR Caseworker Training. Community trainings are held on a quarterly basis around the state. Please check our website to see when the next SOAR training is scheduled: <http://www.ncceh.org/soartrainings/>.

#### ***Who can come to a SOAR Caseworker Training? Why do I need to apply?***

The two-day SOAR Caseworker Trainings are for caseworkers who work directly with individuals in the field who are homeless or at risk of homeless and have a disabling condition. No specific educational background is required to attend a SOAR training.

Those interested in the training must submit an application to ensure that training participants will use SOAR. We ask that their supervisors are aware of the time commitment involved in completing SOAR cases and will support their staff in completing SOAR applications at the agency. We also require a commitment to complete at least one SOAR application with supervisor support within the first 3 months of the training. Please note that submitting an application does not guarantee a spot at the training. Applications are reviewed on a first-come, first-served basis, and there are limited spaces available for each training.

#### ***Do I need to attend a training if I have been trained previously or trained in another state?***

These questions are best answered on an individual basis. Please contact NC SOAR at [soar@ncceh.org](mailto:soar@ncceh.org) to discuss the recent changes that have occurred in the SOAR process in North Carolina and if another training is necessary to complete SOAR applications.

#### ***How do I become a Certified SOAR Caseworker?***

NCCEH offers a SOAR Caseworker Certification process to recognize SOAR caseworkers who successfully implement the SOAR model in their communities. The SOAR Certification process involves attending a two-day SOAR Caseworker Training, completing a total of six SOAR applications, providing

documentation for those cases, taking an exam, and completing a self-evaluation. To learn more about the SOAR Caseworker Certification, please visit NCCEH's website: <http://www.ncceh.org/caseworkers/>.

## **Dedicated SOAR Caseworker Positions**

### ***Why are dedicated SOAR caseworker positions needed?***

The average SOAR case can take 35-40 hours to complete. Many trained caseworkers find it difficult to complete SOAR cases on top of their other job responsibilities. In contrast, dedicated SOAR caseworker positions are able to focus all of their time on completing applications, educating community stakeholders, and gaining expertise in the SSI/SSDI applications process. Since 2009, NCCEH has focused on developing dedicated SOAR caseworker positions, and it has led to an increase in the number of individuals that have been connected to SSI/SSDI benefits, housing, and healthcare.

### ***What skills do dedicated SOAR caseworkers need to have?***

Dedicated SOAR caseworkers do not need to have a particular level of education. However, dedicated SOAR caseworkers will need to be able to do the following to complete SOAR applications:

- Assess individuals based on medical records and interviews
- Engage hard-to-reach individuals
- Write reports for SSA describing disabling conditions
- Advocate within a variety of systems
- Organize large volumes of information for completing applications in a timely manner

NCCEH advises agencies who are hiring for a dedicated SOAR caseworker position to request a writing sample during the interview process. Please contact Emily Carmody at [soar@ncceh.org](mailto:soar@ncceh.org) with further questions about qualifications and job descriptions.

### ***What is the average caseload for a dedicated SOAR caseworker position?***

It is important to keep in mind that SOAR cases will stay on a caseload for up to 6 months. The initial two months in the application process, during which the caseworker prepares the SOAR application, are time-intensive. The average 3-4 months of tracking the case through the SSA and DDS process are less intensive.

We recommend agencies limit the number of new SOAR cases that are referred to beginning dedicated SOAR caseworkers to 2-3 per month. As the caseworker gains expertise, they may be able to increase the number new of cases they take on to 4-5 cases. Keep in mind, they will have a rolling SOAR caseload, and an applicant will stay on a caseload for up to six months while the application is completed and processed and the individual is connected to benefits and housing. It is important not to sacrifice the quality of the SOAR applications being submitted for the quantity of cases. The success of SOAR relies on submitting a strong initial application so that the case is not caught in the long process of appeals.

### ***What agencies have dedicated SOAR caseworker positions?***

Many agencies and communities around the state have recognized the need for dedicated SOAR caseworker positions. These positions are in a variety of agencies, including: Local Management Entities/Managed Care Organizations, homeless service agencies, shelters, outreach teams, Departments of Social Services, medical clinics, mental health providers, and disability advocate agencies.

### ***How do I get funding for a dedicated SOAR caseworker position?***

Dedicated SOAR caseworker positions are most often funded by the agencies or systems of care where the caseworkers are located. Dedicated SOAR caseworker positions are best placed in systems that intersect with homeless individuals who have disabling conditions. Agencies that fund dedicated SOAR Caseworkers include shelters, drop-in centers, outreach teams, LME/MCOs, and local hospitals.

A variety of funding streams support dedicated positions, including PATH funds, IPRS funds, private donations, foundation grants, and general operating funds. If you are considering developing a dedicated SOAR caseworker position and would like to discuss funding ideas, please contact Emily Carmody at [soar@ncceh.org](mailto:soar@ncceh.org).

## **NCCEH and NC SOAR**

### ***What is NCCEH's role in SOAR?***

As the state lead for NC SOAR, the North Carolina Coalition to End Homelessness (NCCEH) provides training and ongoing technical assistance to caseworkers, agencies, and communities who use SOAR or are interested in incorporating SOAR into their plans to end homelessness. NCCEH also advocates for systemic changes with agencies like SSA and DDS to support SOAR casework being done in the state.

NCCEH provides a variety of resources for SOAR caseworkers and communities including: Community SOAR Outcome Reports, SOAR Caseworker Certification, SOAR Community Certification, SOAR Dialogue Group phone calls, and a variety of handouts, forms, and tools on NCCEH's website. To find out more about these resources, please visit NCCEH's website: <http://www.ncceh.org/ncsoar/>.

### ***When do I report my SOAR outcomes to NCCEH? How do I know my community's outcomes?***

NCCEH gathers all the outcome data for SOAR cases in North Carolina. We rely on SOAR trained caseworkers to submit their outcomes by using the SOAR Outcome Reporting Tool. Please submit the **SOAR Outcome Reporting Tool** when you receive a decision from SSA and are able to provide the information requested on the **SOAR Outcome Reporting Tool**. Caseworkers may either enter the information over our website at <http://www.ncceh.org/soar/reportingtool/> or download the form from <http://www.ncceh.org/caseworkers/> and fax it to 1-888-742-3465.

All data collected by the SOAR Outcome Reporting Tool is important, so please do not submit forms with blank answers. If there are specific details that you wish to include that are not requested in the SOAR

Outcome Reporting Tool, please include them in the comments section at the end of the form. SOAR outcome data is posted by county on the NCCEH website: <http://www.ncceh.org/community/>.

### ***What is the SOAR Dialogue Group? How do I join?***

The SOAR Dialogue Group is a monthly conference call for trained SOAR caseworkers from across the state. The SOAR Dialogue Group phone call is on the third Thursday of every month from 10-11 am. During this phone call, SOAR caseworkers discuss relevant topics to improve their SOAR cases, problem solve, and hear about best practices being used in other communities.

SOAR Dialogue Group phone calls are reserved for members of NCCEH. Non-members are allowed to participate in an initial phone call, but in order to join subsequent calls, participants need to have an active membership with NCCEH. If you have questions about membership, please contact Nancy Holochwost at [nancy@ncceh.org](mailto:nancy@ncceh.org). You may register for SOAR Dialogue Group phone calls on the NCCEH website using the events calendar: <http://www.ncceh.org/en/cev/mon/>.

### **Other SOAR Questions**

#### ***Can I do a SOAR case if the person is not homeless? What definition of "homeless" does SOAR use?***

SOAR cases can be completed with individuals who are homeless or are at imminent risk of homelessness. The SOAR definition of homelessness is broader than that used by HUD McKinney-Vento programs. The SOAR definition includes not only persons who are literally homeless (in shelters or living in places not fit for human habitation), but also individuals who are "doubled-up" with others, who have been served with an eviction notice or have otherwise been asked to leave their residence, who have a rental voucher but will lose the voucher if they do not obtain income, or who are exiting jail, prison, or hospitals and have no place to live.

People who have little or no income, but who are not at imminent risk of homelessness, do not meet the definition of homeless or at risk of homelessness under SOAR. SOAR trained caseworkers can still assist these individuals with applications, but they cannot access the NC SOAR process with SSA and DDS for these applications and should not report the outcomes of these cases to NC SOAR.

#### ***Is SOAR only for people with mental illness?***

No. The SOAR model can be used with individuals applying for SSI/SSDI benefits for physical and/or mental health impairments. The SOAR trainings often focus on mental health impairments because the homeless population has a high percentage of individuals with severe and persistent mental illness and because incomplete medical documentation of mental health disorders leads to many cases being denied by DDS.



### ***What does it mean when SSA flags an application?***

SSA has several electronic flags that it uses to notify SSA and DDS employees about important details of a case. Currently, SSA does not have a “SOAR” flag in its computer system. However, many SOAR cases may qualify for the “homeless” flag. In order to qualify for the “homeless” flag, applicants must meet SSA’s definition of homelessness (or transient):

“A transient is an individual with no permanent living arrangement, i.e., no fixed place of residence. A transient is neither a member of a household nor a resident of an institution.

EXAMPLES: A transient can be:

- A homeless individual (i.e., someone who sleeps in doorways, overnight shelters, parks, bus stations, etc.); or
- A person who stays with a succession of friends or relatives and has no permanent living arrangement on the first moment of the month.” (SI 00835.060 POMS)

A case that receives the “homeless” flag is eligible for faster processing at DDS. All cases in which the applicant is homeless qualify for the “homeless” flag, not just SOAR cases. NC SOAR has a special SOAR process with SSA and DDS that you can access once you are SOAR trained.

### ***How do I know who to contact at my local SSA office?***

Once you complete the two-day SOAR Caseworker Training, you will be instructed on how to gain access to NCCEH’s SOAR password-protected web pages. Contact information for SOAR contacts at each SSA office in North Carolina can be found on these pages.

### ***Can SOAR cases be completed for children?***

No. SOAR is designed to serve individuals who are able to apply for benefits as an adult under SSA rules. This includes anyone 18 years of age or older as well as individuals who are within one month of their 18th birthday or children in the foster care system who are within three months of their 18<sup>th</sup> birthday.

*For more information about the NC SOAR Program, please visit our website:*

*<http://www.ncceh.org/ncsoar/> or contact us at [soar@ncceh.org](mailto:soar@ncceh.org).*