The Way Home
Identifying a SOAR Client (Adult)

Houston/Harris/Fort Bend/Montgomery Counties
Continuum of Care

Screening and Referral
What is SOAR?

- A model for assisting eligible individuals to apply for Social Security Administration (SSA) disability benefits
- For individuals who are experiencing or at risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities
- Sponsored by SAMHSA in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, DC currently participate
SSA Disability Programs: The Basics

Supplemental Security Income (SSI)
- Eligibility based on need: low income and resources; living arrangement
- Monthly amount based on Federal Benefit Rate: $794/month (2021)*
- Date of eligibility based on Protective Filing Date/Application Date
- Health insurance: Medicaid

Social Security Disability Insurance (SSDI)
- Eligibility based on insured status (FICA payments)
- Monthly amount based on earnings history
- Date of eligibility based on “date of onset” of disability, 5 month waiting period
- Health insurance: Medicare

Understanding SSI - SSI Income (ssa.gov)
SSA’s Definition of Disability for Adults Ages 18 and Over

• The inability to engage in any substantial gainful activity (SGA) ($1,310/month in 2021)
• By reason of any medically determinable physical or mental impairment(s)
• Which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months.

THIS IS NOT A TEMPORARY DISABILITY PROGRAM
SSA’s Definition of Disability for Children
Ages 0 to 17

“a medically determinable physical or mental impairment, which results in marked and severe functional limitations, and which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months.”

A child’s impairment must meet or medically equal one of SSA’s listings, or functionally equal the listings. To make this determination, SSA will review the child’s medical and educational records, as well as evidence from community sources to evaluate how the child’s functional abilities compare to the functional abilities of a child of the same age who does not have a physical or mental impairment.

Listing of Impairments - Child Listings (Part B) (ssa.gov)
Children’s SSI Key Eligibility Criteria

- Child has a serious mental and/or physical illness, or combination of illnesses.
- The illnesses or conditions have lasted or are expected to last for at least 12 months or are expected to result in death.
- For children with mental illness, he or she has documentation of medical criteria and marked limitation of **two**, or **extreme limitation of one** of the following areas of **mental functioning**:
  - Understand, remember, or apply information (examples include understanding and learning terms, instructions, procedures; identifying and solving problems.);
  - Interact with others (examples include cooperating with others; keeping social interactions free of excessive irritability, sensitivity, argumentativeness, or suspiciousness.);
  - Concentrate, persist, or maintain pace (examples include initiating and performing an activity that the child understands and knows how to do; changing activities without being disruptive);
  - Adapt or manage oneself (examples include maintaining personal hygiene; adapting to changes.)
Children’s SSI Key Eligibility Criteria

- For children with physical or mental health conditions, he or she struggles to do things on a day-to-day basis that other children their age who do not have impairments typically do in the following six broad domains of functioning:
  - Acquiring and using information (learning and using new information);
  - Attending and completing tasks (focusing and maintaining attention, keeping pace in carrying out tasks);
  - Interacting and relating with others (initiating and sustaining emotional connections with others, cooperating with others, complying with rules, responding to criticism, and taking care of possessions);
  - Moving about and manipulating objects (considering the development of gross-and fine-motor skills);
  - Caring for themselves (personal care, including both physical and emotional health, coping with stress and a changing environment); and
  - Health and physical well-being (cumulative physical effects of physical or mental impairments and their associated treatment or therapies on the child’s functioning).
SOAR Recommends: The following characteristics are not essential, but may strengthen an application (CHILD)

- Child is prescribed psychiatric medications and continues to experience symptoms and functional impairments.
- Child has obtainable medical and non-medical evidence (e.g., school records, Individualized Education Program (IEP), 504 accommodations, hospital records) that corroborates mental illness and medical complaints.
- If there is limited medical evidence or large gaps in treatment:
  - Child clearly exhibits symptoms severe enough that a one-time examination by a physician would demonstrate issues;
  - Representative can write a Medical Summary Report that details symptoms and functional impairments that demonstrates diagnosed disability; and
  - Interviews and statements are available from all persons in a caregiving role.
- Child receives more help than a child of the same age without an impairment would need.
- Child receiving special education and/or early intervention services, and needs accommodations at school or home.
- Child needs a structured or supportive setting.
- Child lives, or has lived for a period of time, in a residential facility or school.
Key Eligibility Criteria: The following 4 characteristics represent key eligibility criteria for SSA disability benefits (ADULT)

1. Applicant has a serious mental illness or exhibits symptoms and/or has serious physical illnesses that affect his/her ability to work at a substantial gainful level ($1,310/month in 2021)

2. The illness(es) or condition(s) have lasted or are expected to last for at least 12 months (or result in death)

3. Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevents sustainable employment.

For example:
- Psychotic Symptoms (positive or negative)
- Depressive Symptoms (decreased energy, lack of motivation, suicide attempts)
- Manic Symptoms (racing thoughts, disorganized thoughts)
- Anxious feelings (paranoia, nervousness)
- Cognitive deficits (brain injury, problems with concentration, memory, etc.)
- History of trauma (history of abuse, posttraumatic stress disorder, etc.)
For applicants with mental illness, he/she has marked restrictions in at least 2 of these functional areas, or extreme limitations in one area:

- Understand, remember, or apply information (memory, following instructions, solving problems, etc.)
- Interact with others (getting along with others, anger, avoidance, etc.)
- Concentrate, persist, or maintain pace (as they relate to the ability to complete tasks)
- Adapt or manage oneself (hygiene, responding to change, setting realistic goals, etc.)
SOAR Recommends: The following characteristics are not essential, but may *strengthen* an application (ADULT)

- Applicant is prescribed psychiatric medications and continues to experience symptoms and functional impairments

- Applicant has obtainable medical evidence (for at least part of the past 12 months) that corroborates mental illness and medical complaints.

- Applicant clearly exhibits symptoms severe enough that a one-time examination by a physician would demonstrate issues
SOAR Recommends: The following characteristics are not essential, but may *strengthen* an application (ADULT)

- Applicant is not working due to medical and/or psychiatric conditions (i.e. not because he/she cannot find work or was laid off)

- History of failed work attempts (started and stopped employment due to diagnosed conditions)

- Long work history, but can no longer work up to SGA ($1,310/month in 2021) due to conditions

- Scattered work history due to conditions and other factors
If Client is a good SOAR Candidate

• Refer to SOAR Dedicated Caseworker in your organization
  • In HMIS add ‘SOAR Referral’ and complete entries
  • Release the information by selecting Edit Client/Release Exceptions
  • Select the organization where you are sending referral if not already selected
  • Scan in any documents/case notes you have related to Soar screening/referral

• If you do not have a SOAR Dedicated Case worker refer to Stefanie Quintela
  • In HMIS add SOAR Referral and select Stefanie Quintela CFTH as provider
  • In comment section indicate why you are making the referral i.e. which characteristic did your client meet
  • Scan in any documents/case notes you have related to SOAR screening/referral
  • Release the information by selecting Edit Client/Release Exceptions
  • Select Coordinated Access and Coalition For The Homeless if not already selected
HMIS

How to Add SOAR Referral in HMIS
Select Referrals from Client Dashboard
Select Referral to SOAR
Hit Search for Referral Recipient and Select from List as Appropriate
Indicate in comments why you are making the referral – Then hit Next and Finish
Don’t forget to Release Exceptions as appropriate
Release Exceptions as appropriate – Save & Close
When to send Referrals to SSA

If at any point during your Screening and Referral Process you find that your client is not eligible for the SOAR Program but he/she still wants to file for disability benefits please complete and either

fax the VPAP SSA Vulnerable Populations SSI Referral Form to the SSA Vulnerable Population Liaison using the VPAP Fax Cover Sheet or

Email SSI Referral Form to the SSA VPL (next two slides)

***In HMIS add Referral To SSA Office select local office based on client zip code as provider
Which SSA Office Do I Use

- Locate Field Office Using SSA Office Locator web page and enter **client Zip Code or your organization zip code**
  - https://secure.ssa.gov/ICON/main.jsp
<table>
<thead>
<tr>
<th>Office Name</th>
<th>Vulnerable Population Liaison</th>
<th>Address</th>
<th>Email</th>
<th>Phone #</th>
<th>Efax #</th>
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<tr>
<td>856 HOUSTON NORTHEAST TX</td>
<td>Toni Jesse</td>
<td>5414 ALDINE MAIL RD</td>
<td><a href="mailto:Toni.Jesse@ssa.gov">Toni.Jesse@ssa.gov</a></td>
<td>77039 (866) 931-2729</td>
<td>(833) 950-2714</td>
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<tr>
<td>855 HOUSTON NORTHWEST TX</td>
<td>Tracy Amos</td>
<td>16200 DILLARD DR</td>
<td><a href="mailto:Tracy.Amos@ssa.gov">Tracy.Amos@ssa.gov</a></td>
<td>77040 (866) 331-3277</td>
<td>(833) 950-2712</td>
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<tr>
<td>857 HOUSTON SOUTHEAST TX</td>
<td>Alfonso Flores</td>
<td>8989 LAKES AT 610 DR</td>
<td><a href="mailto:Alfonso.Flores@ssa.gov">Alfonso.Flores@ssa.gov</a></td>
<td>77054 (866) 404-1861</td>
<td>(833) 950-2716</td>
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<tr>
<td>816 HOUSTON SOUTHWEST TX</td>
<td>Carlos Guerrero</td>
<td>10703 STANCLIFF RD</td>
<td><a href="mailto:Carlos.A.Guerrero@ssa.gov">Carlos.A.Guerrero@ssa.gov</a></td>
<td>77099 (866) 592-1608</td>
<td>(833) 515-0520</td>
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Complete SOAR Fax cover sheet Third Party Application

Fax with VPAP SSA Vulnerable Population SSI Referral Form To Local SSA Office
Select Referrals from Client Dashboard
Select Add New Referral
Referral Service: Select ‘Referral to SSA’
Search Provider: Select SSA Office based on Client or your organization’s Zip Code
In comments indicate Referral Form sent to SSA Office – Then hit Next twice and Finish