

**Department of
Veterans Affairs**

Memorandum

Date: February 3, 2022

From: Assistant Under Secretary for Health for Clinical Services/Chief Medical Officer (CMO) (11)

Subj: Request to Assign Employees to Assist with Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) Outreach, Access, and Recovery (SOAR) (VIEWS 6741507)

To: Veterans Integrated Service Network (VISN) Directors (10N1-23)
VISN Network Homeless Coordinators (10N1-23)
Chief Medical Officers (10N1-23)

1. The purpose of this memorandum is to further clarify that in support of applications made through SOAR, Veterans Affairs (VA) employees may act as an advocate, sign application documents, and act as the Veteran's authorized representative. If the employee is assigned representational activities, they are appropriately documented as part of their official duties. This includes first asking the Veteran to complete and sign VA Form 10-5345, *Request for and Authorization to Release Medical Records and Health Information*, and authorizing disclosure to the Social Security Administration within the form. This also includes assisting the Veteran in completing and signing the SSA-1696 *Appointment of Representative* form and serving as the applicant's Appointed Representative. This completed form allows staff to share information with the Social Security Administration (SSA), answer questions without the applicant's presence, maintain communication, and receive copies of all letters/requests that SSA sends to the applicant so as to maintain up-to-date information on the applicant's claim.

2. The goal to end homelessness among Veterans remains a priority for the Department of Veterans Affairs. To get there, communities are encouraged to explore all available resources from Federal, State, and local government, as well as from the private sector. For example, existing non-VA resources such as SSI/SSDI can substantially assist Veterans experiencing or at-risk of homelessness by providing them with consistent income that often promotes permanent housing stability, self-sustainment, functional independence, and ongoing care for Veterans with disabling conditions.

3. Because the SSI/SSDI application process is cumbersome, Veterans Health Administration (VHA) personnel in homeless programs can help Veterans by being assigned to be trained in and utilize the SOAR program. SOAR is a Federal Interagency project with the SOAR Technical Assistance (TA) Center

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funded by the Substance Abuse and Mental Health Services Administration (SAMHSA). SOAR is designed to increase access to SSI/SSDI benefits for eligible individuals who are experiencing or at-risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR is proven to increase the approval rate for those applying as well as expedite the time it takes for individuals to obtain access to such financial benefits.

4. In accordance with the Federal interagency SOAR program, it is encouraged to assign VHA homeless staff involved in managing the medical conditions of Veterans' experiencing or at-risk of homelessness be available to assist Veterans with gathering required information, as well as assisting with completing required documentation, and assisting with the submission to the SSA. Additionally, employees would be allowed to disclose VA records if the Veteran signs the appropriate release of information form (SSA Form-827) and could be listed as a point of contact on the Disability Report- Adult (SSA Form-3368). Employees should not act as Representative Payees (SSA Form-11).

5. This assistance ensures timely access to SSI/SSDI benefits, which improves and supports the Veteran's recovery-oriented clinical treatment goals of permanent housing stability, self-sustainment, functional independence, reinforces and promotes ongoing care for the Veteran's disabling condition. Assisting Veterans experiencing or at-risk of homelessness with the SSI/SSDI application process is consistent with VA's adoption of the Housing First and Recovery Models, is intended to promote, preserve, and restore the health of the Veteran. Furthermore, assisting Veterans to complete SSI/SSDI applications encourages the efficient processing of SSI/SSDI applications by ensuring that the Veteran's application is accurate and complete. This assistance can help eliminate unnecessary claims appeals and improves overall efficiency and effectiveness within the SSA.

6. Beyond assisting with the SOAR process, if the Veteran is not yet receiving VA benefits secondary to mental health condition, VHA homeless staff should assist the Veteran in filing any appropriate mental health disability claim with the Veterans Benefits Administration and should ensure that the Veteran attends their scheduled mental health compensation and pension evaluation. The SSA requires that applicants for SSI/SSDI document that they have applied for all benefits for which they are eligible.

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7. Resources are available from the SAMHSA SOAR TA Center:

- The SOAR Online Course: Adult and Child Curricula include comprehensive information about SSI/SSDI and the disability determination process as well as the SOAR Critical Components of completing and submitting SSI/SSDI applications:
<https://soarworks.samhsa.gov/content/soar-online-course-catalog>
- Full directory of guidance and resources for Veterans:
<https://soarworks.samhsa.gov/topics/veterans>
- SOAR Works to End Veteran Homelessness: VA Caseworker's Guide:
<https://soarworks.samhsa.gov/article/soar-va-guide>

8. Thank you for your continued support in preventing and ending homelessness among Veterans and their families. Should you have any questions on this memorandum, please contact Allison Bond, National Program Manager, Community Resource and Referral Centers by email at Allison.Bond@va.gov.



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