

## Implementing State and Local SOAR Initiatives

State and Local Leads spearhead and coordinate the implementation of SOAR initiatives. These leaders identify and engage stakeholders to participate in steering committees whose goal is to create and implement a SOAR action plan and process for adult SSI/SSDI and/or child SSI application submission. These committees meet regularly to collaborate, report on progress, and troubleshoot challenges.

### Introduce SOAR to your community

- Identify and engage agencies and stakeholders to participate in your SOAR initiative. Educate and inform them about the purpose and benefits of SOAR for individuals with disabilities.
- Offer SOAR Orientation presentations for agency leadership and direct service providers.
- Attend existing community meetings and share information about the importance of SOAR.

### Train and support staff that assist adult SSI/SSDI and/or child SSI applicants

- Identify programs that are currently assisting adults, children and families experiencing or at-risk of homelessness with Social Security disability applications. Explore reallocation of existing resources to incorporate fully or partially dedicated SOAR benefits specialists.
- Identify staff to complete the SOAR Online Course: Adult and/or Child Curriculum. Provide guidance throughout and following the training. Inform trainees of any state/local-specific processes.
- Establish quality review procedures to assess fidelity to the SOAR model and ensure that applications are complete and high quality. Get feedback from SSA/DDS on SOAR-assisted applications they are receiving.

### Collaborate, Collaborate, Collaborate

- *Social Security Administration (SSA) and Disability Determination Services (DDS).* Negotiate a SOAR Process for adult SSI/SSDI and child SSI application submission. Identify SSA/DDS SOAR liaisons in local offices.
- *Medical Providers:* Identify medical providers who can provide physical/psychiatric evaluations and co-sign Medical Summary Reports. Explore using retroactive Medicaid to reimburse for medical evaluations. Set up a process to obtain medical records, free of charge if possible.
- *Other Collaborations:* Think broadly! Include school administrators, vocational service providers, housing agencies, jails/prisons, Veteran services, and representative payee services.

### Track and report outcomes

- Identify tracking mechanism to be used (e.g., SOAR Online Application Tracking (OAT) or HMIS).
- Establish procedures for the reporting of outcomes by communities and SOAR-trained staff.
- Report outcomes to the SAMHSA SOAR TA Center as requested.

### Fund and sustain

- Use your outcomes to expand or sustain your SOAR initiative.
- Educate stakeholders, influential leaders, and potential funders about the impact SOAR has in your state. Share success stories; report on cost savings (reimbursement/recoupment totals).
- Explore various funding sources. Consider use of federal funds (e.g. PATH, CABHI, Systems of Care); pool and/or realign existing resources; explore local foundations, United Way, corporations, and hospital collaborations; and investigate criminal or juvenile justice funding to implement SOAR in jails, prisons, or detention facilities.