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SSA Disability Benefits for Non-Citizens: Refugee Resettlement and SOAR

PRESENTED BY:

SAMHSA SOAR TECHNICAL ASSISTANCE CENTER
POLICY RESEARCH ASSOCIATES, INC.

UNDER CONTRACT TO:

SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES





Disclaimer

- This training is supported by the Substance Abuse and Mental Health Services Administration (SAMHSA) and the U.S. Department of Health and Human Services (DHHS)
- The contents of this presentation do not necessarily reflect the views or policies of SAMHSA or DHHS.





Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Questions and Answers





Agenda

SOAR Overview

- Jen Elder, National Policy and Partnerships Coordinator, SAMHSA SOAR TA Center, Policy Research Associates, Inc.

Social Security Disability Benefits for Non-Citizens

- Diana Varela, Public Affairs Specialist, Social Security Administration, Silver Spring, MD

The SOAR Process, Refugees, and Non-Citizens

- Gerardo Benavides, Community Relations Coordinator, Health Care for the Homeless, Baltimore, MD

The SOAR Online Course and Next Steps

Questions & Answers





The SOAR Model

How Does SOAR Work?



What is SOAR?

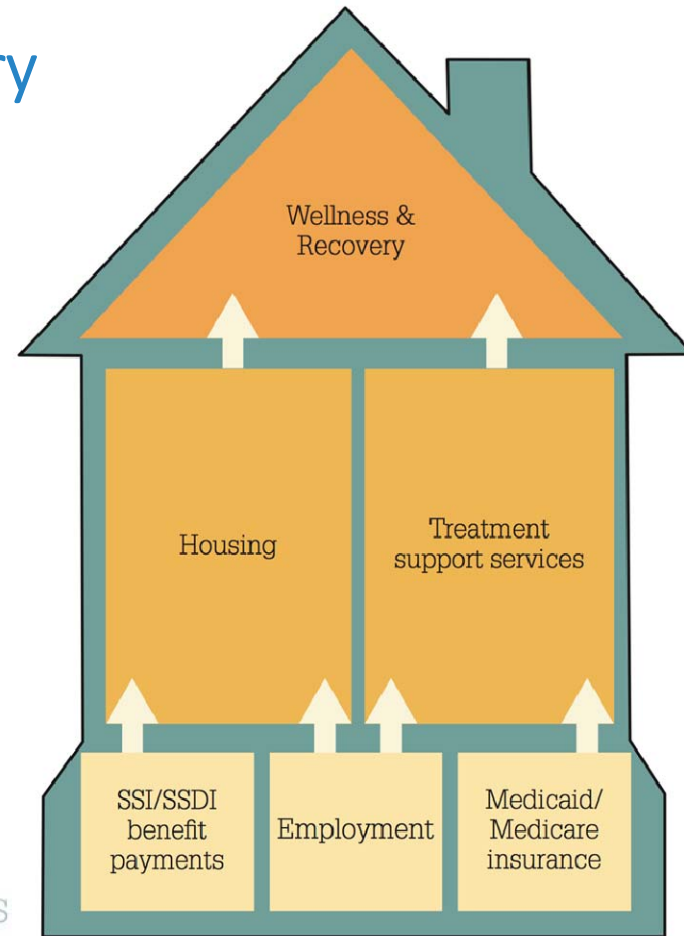
- A model for assisting eligible individuals to apply for Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI)
- For individuals who are experiencing or at-risk of homelessness and have a serious mental illness, co-occurring substance use disorder, or other physical disabilities
- Sponsored by the Substance Abuse and Mental Health Services Administration (SAMHSA) in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, D.C. currently participate



A Foundation for Recovery

SSI provides more than income:

- Access to health care and housing
- Increased employment opportunities
- Decrease in incarcerations and hospitalizations



SOAR WORKS

SAMHSA

What Makes SOAR Unique?

SOAR-trained case workers are the heroes!

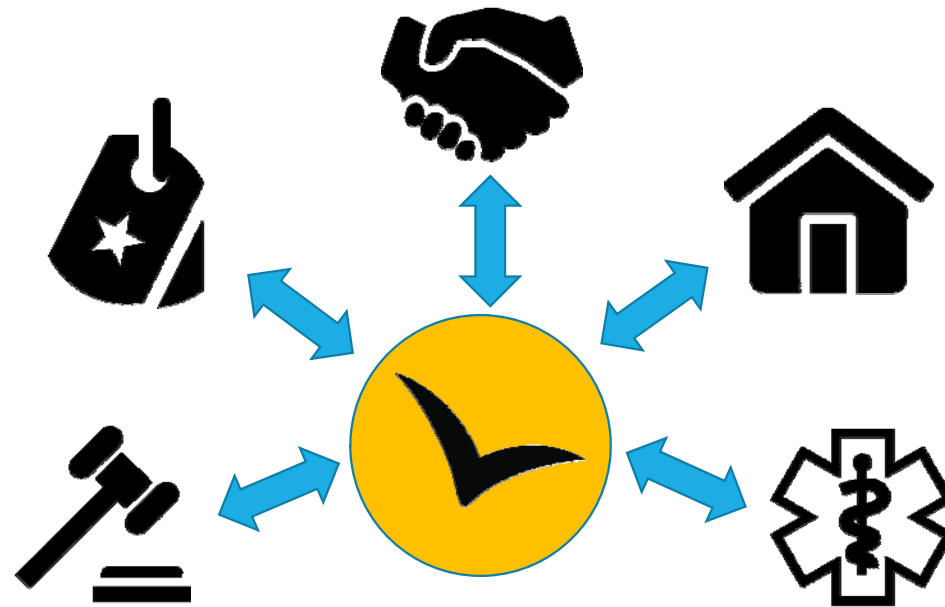


SOAR WORKS CRITICAL COMPONENTS





Community Collaborations





SOAR Leadership Structure



SOAR TA Center

- Facilitates strategic planning meetings
- Conducts Leadership Academies, webinars, & learning communities
- Develops resources, including SOARWorks, the SOAR Online Course, and OAT
- Provides TA at all stages of SOAR implementation

State Team Lead

- Facilitates state steering committee
- Directs plans to grow & sustain statewide activities
- Serves as liaison to localities
- Maintains relationships with SSA & DDS
- Submits SOAR outcomes to the TA Center

Local Lead

- Facilitates local steering committee
- Directs local implementation plans
- Facilitates SOAR Online Course cohorts
- Conducts SOAR Fundamentals trainings
- Ensures quality applications & reports outcomes

Case Manager

- Completes high-quality SSI & SSDI applications using the SOAR model
- Communicates with local SSA & DDS representatives
- Tracks application outcomes





SOAR Works!

CUMULATIVE OUTCOMES

34,919

cumulative initial approvals

40,311

people receiving benefits because of SOAR

5,392

cumulative appeal approvals





Social Security Disability Benefits for Non-Citizens

Diana Varela, Public Affairs Specialist, Social Security Administration

Silver Spring, MD





Social Security: With You Through Life's Journey...



Securing today
and tomorrow



Produced at U.S. taxpayer expense

We're With You If
The Unexpected Happens



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[SocialSecurity.gov](https://www.SocialSecurity.gov)

Our Roles: Who Does What?

Social Security Administration

- Assist in Filing
- Decide on Non-Medical Issues
- Establish Policies and Procedures

Disability Determination Services

- Secure Evidence
 - Medical
 - Functional
 - Vocational
- Make Disability Determination for SSA
 - Initial
 - Reconsideration
 - Continuing Disability Review



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Social Security Definition of Disability - Adult

- “The inability to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment that can be expected to result in death or that has lasted or can be expected to last for a continuous period of not less than 12 months.”



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Social Security Definition of Disability - Child

- A child under the age of 18 must have a medically determinable physical or mental impairment or combination of impairments that causes marked and severe functional limitations
 - Impairment(s) must be expected to result in death, or be expected to last for a continuous period of 12 months
 - No individual under the age of 18 who engages in substantial gainful activity may be considered disabled



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SSDI vs. SSI

Social Security Disability Insurance	Supplemental Security Income
Payments come from the Social Security trust funds and are based on a person's earnings.	Payments come from the general treasury fund, NOT the Social Security trust funds. SSI payments are not based on a person's earnings.
An insurance that workers earn by paying Social Security taxes on their wages.	A needs-based public assistance program that does not require a person to have work history.
Pays benefits to disabled individuals who are unable to work, regardless of their income and resources.	Pays disabled individuals who are unable to work AND have limited income and resources.
Benefits for workers and for adults disabled since childhood. Must meet insured status requirements.	Benefits for children and adults in financial need. Must have limited income and limited resources.



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Social Security Disability Insurance (SSDI)

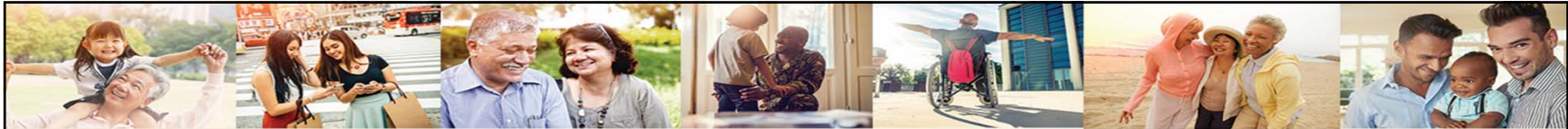
The SSDI program pays monthly benefits to you and to certain members of your family if:

- You have worked long enough, recently enough, and
- You have a medical condition that has prevented you from working – or is expected to prevent you from working – at a substantial level for at least 12 months, or your medical condition is expected to end in death.



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Supplemental Security Income (SSI)

Social Security administers the Supplemental Security Income program, which pays benefits to disabled adults and children who have limited income and resources.

SSI benefits also are payable to adults age 65 and older who do not have disabilities, if these individuals meet the financial limits.

People who have worked long enough, recently enough, may be able to receive Social Security benefits – such as disability or retirement – as well as SSI.



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Non-Citizen Requirements for SSI

- Must be an Asylee or Refugee
 - Will get benefits for 7 years
- Must be Qualified Alien based on DHS Status
 - (lawfully residing in the United States on August 22, 1996)



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SSI Resource Limits

- Resources
 - Cash
 - Car
 - Bank accounts
 - Bonds/Stocks
 - Non-home property
- Limits
 - \$2000 individual
 - \$3000 couple



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Be Prepared to Provide Detailed Information

- Applicant can help by supplying information
 - Medical treatment:
 - names, addresses, telephone numbers, dates of treatment of doctors, hospitals, and clinics
 - medications
 - medical records and lab studies, if available
 - Other supporting information
 - school information
 - summary of jobs and types of work
 - function/ADLs



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Applying for Benefits

3 options available to apply:



Online



By phone 1-800-772-1213



At our office

You choose the most convenient option for you!

Note: Supplemental Security Income (SSI), child and survivor claims can only be done by phone or in a field office (not online) at this time. We are developing an online SSI application.



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Sequential Evaluation Process

ADULT

- Is the claimant engaging in SGA?
- Is the impairment(s) severe?
- Does the impairment(s) meet/equal listings?
- Does the impairment(s) preclude the ability to perform past relevant work?
- Does the impairment(s) preclude the ability to perform other work?

CHILD

- Is the child engaging in SGA?
- Is the impairment severe?
- Does the impairment(s) meet, medically equal or functionally equal the listings?



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Evidence Considered

- Objective evidence:
Physical exam, x-rays, labs, specialized testing (ETT, PFT, echo, MRI, etc.)
- Subjective evidence:
How symptoms such as fatigue and pain weigh in the decision
- Medical opinions from treating and examining sources



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How the Adjudication Process Works

- Assigned to a disability examiner
- Medical sources are contacted
- Consultative exams are scheduled, if needed
- Evidence is reviewed by a medical consultant
- A decision is made



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Call the DDS at 1-410-308-4500 or 1-800-492-4283, ext 4500

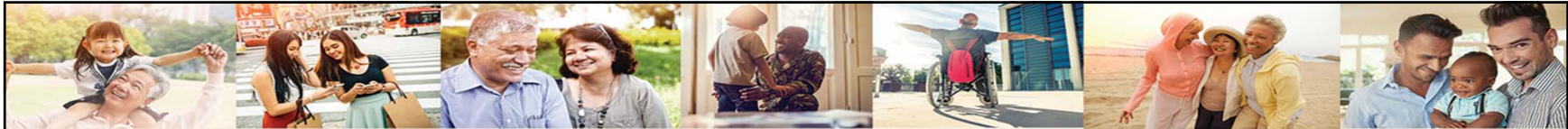
- Encourage patient, guardian and/or representative to contact DDS
- Ask for name and telephone number of claims examiner handling individuals disability claim
- **CALL AND STAY IN TOUCH**

Communication is Key!



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Compassionate Allowances (CAL)

- A way of quickly identifying diseases and other medical conditions that invariably qualify under the Listing of Impairments based on minimal objective medical information
- Allows Social Security to target the most obviously disabled individuals for allowances based on objective medical information that we can obtain quickly
- Is not a separate program from the Social Security Disability Insurance or Supplemental Security Income programs

socialsecurity.gov/compassionateallowances



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Disagree With The Medical Decision?



If you recently applied for Social Security or Supplemental Security Income disability benefits and were denied for medical reasons, you can file an appeal online and check the status with your personal *my* Social Security account.



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Appeals Process

- You have 60 days from receipt of personalized determination notice to appeal at each level
 - Reconsideration
 - Administrative Law Judge
 - Appeals Council
 - District Court



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[SocialSecurity.gov](https://www.SocialSecurity.gov)

On-Line Resources

- Disability Evaluation Under Social Security:
www.ssa.gov/disability/professionals/bluebook/index.htm
- SSA Website:
www.socialsecurity.gov
- SSA Publication
www.ssa.gov/pubs/
- Compassionate Allowance
<https://www.ssa.gov/compassionateallowances/>
- DDS Website
<http://dors.maryland.gov/resources/Pages/DDS.aspx>



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Items of Interest

 Benefits Planner	 Calculators	 Check Application or Appeal Status	 Contact Us	 Forms
 Publications	 Closings & Emergencies	 Change of Address	 Social Security Statement	 Medicare Card
 Ticket to Work	 Need information about benefits for same-sex couples?	 opengov @SocialSecurity	 WHAT BENEFITS AM I ELIGIBLE FOR?	 Plain Writing

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[Benefits.gov](#) [Disability.gov](#) [MyMoney.gov](#) [Regulations.gov](#) [USA.gov](#) [Other Government Sites](#)

Securing today and tomorrow

SocialSecurity.gov

The screenshot shows the Social Security website interface. At the top, there is a dark blue header with the Social Security Administration logo, the text "Social Security", and navigation links for "SEARCH", "MENU", "LANGUAGES", and "SIGN IN / UP". Below the header, the main heading reads "Explore The Benefits You May Be Due".

On the left side, there is a large image of a person's hands using a magnifying glass over a tablet. Below this image is the section title "You, or Your Family Members, May Be Eligible for Increased Benefits". The text in this section states: "Our mission is to deliver Social Security services that meet the changing needs of the public. It's not unusual for a benefit recipient's circumstances to change after they apply or became eligible for benefits. If you, or a family member, receive Social Security or Supplemental Security Income (SSI), certain life changes may affect eligibility for an increase in your federal benefits. For example, if your spouse or ex-spouse dies, you may become eligible for a higher Social Security benefit. To find out if you, or a family member, might be eligible for a benefit based on another person's work, or a higher benefit based on your own work, see the information about benefits on the Social Security website. You can also use the [Benefit Eligibility Screening Tool \(BEST\)](#) to find out if you could get benefits that Social Security administers. Based on your answers to questions, this tool will list benefits for which you might be eligible and tell you more information about how to qualify and apply. The questions and answers below are about a few of the life changes that could

On the right side, there is a "Related Information" section with links for "Retirement Planner", "Disability Planner", and "Survivors' Planner". Below this is the "BEST" logo (Benefit Eligibility Screening Tool) and a "my Social Security" login box with "Log In" and "Create an account" options.

At the bottom of the page, there is a light blue footer containing the Social Security Administration logo on the left, the slogan "Securing today and tomorrow" in the center, and the website address "SocialSecurity.gov" on the right.

The SOAR Process, Refugees, and Non-Citizens

Gerardo Benavides
Community Relations Coordinator
4/17/2018



Background: Who is eligible for SSI?

There are special considerations for non-U.S. citizens who are potentially eligible for Supplemental Security Income (SSI). Immigrants eligible indefinitely for benefits:

- Permanent residents who have worked 40 qualifying quarters (or credits), which are reported to SSA (This generally takes 10 years or more)
- Veterans with an honorable discharge
- Active military in the U.S. Armed Forces
- Spouse or unmarried dependent child of Veteran or individual who is on active military duty
- Individual who was a legal permanent resident as of August 22, 1996 and became disabled after that date
- Individual lawfully residing in the U.S. and receiving SSI benefits on August 22, 1996



Background: Who is eligible for SSI?

Immigrants eligible for up to 7 years of benefits—or your clients (most likely)!

- Refugees
- Asylees
- Immigrants whose deportation is withheld



Background: Who is eligible for SSI?

What happens after 7 years?

- During the seven-year period of potential eligibility, immigrants are expected to work toward becoming U.S. citizens. If they do not, eligibility will stop after seven years.
- SSA will send reminders to notify immigrants when their seven-year eligibility period ends. Beneficiaries will receive another letter explaining their rights to appeal before SSA stops payments.



Refugees and Mental Health: Context

Prevalence of mental health issues varies depending on the migrant group

- State of migration trajectory affects exposure to certain risks
 - Pre-Migration
 - Migration
 - Post-Migration



Refugees and Mental Health: Context

Noticeable characteristics and trends in the immigrant population

- **Pre-migration:** disruptions to social roles, networks
- **Migration:** prolonged uncertainty (about long-term home, citizenship); possibility of greater exposure to violence, harsh conditions in refugee camps, detention centers, unfamiliar communities
- **Post-migration:** initial positive effect after arrival (period of hope and optimism), but afterwards can devolve into disillusionment and demoralization, depending on difficulty of resettlement



Refugees and Mental Health: Concerns and Risk Factors

- Forced displacement
- Extensive exposure to traumatic experiences during conflict, while living in camps, and/or during migration
 - Torture
 - Violence
 - Abuse (physical, sexual, mental, domestic)
- Lack of access to quality health care and education (primary, dental, mental)
 - Leads to malnutrition; exacerbation of chronic conditions; mental and emotional burdens



Refugees and Mental Health: Resettlement Concerns

- Limited access to preventative health care coverage (dental, vision)
- Difficult to navigate health care and insurance systems
- Environmental stressors
- Cultural responsiveness, humility among health care providers



Refugees and Mental Health: Resettlement Concerns

What keeps refugees, and other immigrant groups, from accessing mental health services during resettlement?

- Prioritization of needs (employment, somatic health issues, institutional requirements)
- Language (patient, or provider, not knowing about available interpretation services; distrust of interpretation available)
- Cultural barriers (stigmatization)



What does all of this context mean?

- Prior to applying for SSI benefits, collect all of the medical documentation your client has available
 - Overseas medical documents (Biodata—can be accessed from the resettlement agency);
Initial health assessment documentation
- Upon arrival, and as early as you can in the resettlement process, connect your client to health care providers!
 - Important regardless, but also depends on the condition for which your client is claiming disability
 - May require you to wait for Medicaid coverage



What does all of this context mean?

- Seek culturally responsive, humble health care providers
 - Advocate! Provide the provider with context into your client's condition(s)
 - Explain the effects of migration, culture
- Work with families, community organizations, interpreters
 - To get your client connected to services; to dismantle stigmatization
- Begin gathering anecdotal and observational evidence



The SSI application process

- Advocate!
 - Possibility of a lack of cultural responsiveness, humility from front-line SSA staff
 - Bring in professional interpreters; family, friends less likely to provide objective work
- Provide as much information as you can on the Function, Medical Summary Reports
 - From available medical documentation
 - From anecdotal and observational evidence



The SSI application process

- Documents needed:
 - SSI Application (SSA 8000)
 - Claimant's Appointment of Representative (SSA-1696)
 - Consent for Release of Information (SSA-3288)
 - Authorization to Disclose Information (SSA-827)
 - Optional: SSDI Application (online!), and the Cover Sheet (both online)



The SSI application process

- Function or Medical Summary Reports
 - Remember: the goal of both of these reports is to provide a comprehensive depiction of the client's personal, psychiatric, and functional impairments that may not be captured in available medical documentation
 - It is a DYSFUNCTIONAL analysis -- again, looking at functional limitations stemming from mental health (or somatic) symptoms
 - ALL components of the reports should relate to symptoms and how they impact the client's ability to: understand, remember, or apply information; interact with others; concentrate, persist, or maintain pace; adapt or manage oneself



The SSI application process

- Connect all of the dots
- What is it like for your client on their absolutely WORST day of functioning? How does this connect to their mental health (or somatic) symptoms?



The SSI application process

- When all else fails, go back to the listings!
 - Connect
 - Symptoms
 - Marked limitations in areas of functioning





SOAR Online Course

An Overview



SOAR Online Course

Articles & Content

What is SOAR?

Many people with disabilities who experience homelessness or are at risk of homelessness (e.g., those returning to the community from institutions such as jails, prisons, or hospitals) struggle to access the resources they need. The Social Security Administration (SSA) has two programs that can provide assistance.

Many suffer from disabling mental illnesses, co-occurring substance use, trauma, and medical issues that impact their ability to work. The path to recovery can be extraordinarily challenging when one is constantly struggling to meet basic needs. Having income and health care benefits is often a critical first step on the road to recovery.

The Social Security Administration (SSA) has two programs that can provide assistance.

- Supplemental Security Income (SSI), a needs-based program, for individuals who are blind, disabled, or elderly, with low income/resources
- Social Security Disability Insurance (SSDI) for blind or disabled individuals who are insured through employee and employer contributions to the Social Security Trust Fund
- In most states Medicaid and/or Medicare health insurance accompany these benefits for those eligible

Circumstances can impede access to income and health care benefits.

- SSA communicates mainly by mail, which is a challenge when one does not have a permanent, reliable address
- People who are experiencing homelessness often have sporadic medical care, making it difficult to access medical records to document disability
- Symptoms can interfere with cognitive functioning, making it difficult to navigate a complex system.

CLASSES IN THIS COURSE

1. The Need for SOAR
 - Class Home
 - 1. What is SOAR?
 - 2. SOAR Values
 - 3. SSA: What is Disability?
 - 4. Overview of Social Security Disability Programs: SSI and SSDI
 - 5. Access to SSA Disability Programs: Fees, Roles & Tasks
 - 6. Steps in the SSA Disability Application Process
 - 7. Disability Determination: The SSA Sequential Evaluation
 - 8. Definitions of Homelessness
 - 9. The SOAR Model: Key Components
 - 10. Identifying SOAR Applicants
 - 11. Steps to Completing an SSI/SSDI Application Using the SOAR Model
 - 12. Try It: Key Concepts of Class 1
 - 13. Conclusion
2. Initiating the Application
3. Exploring Basic Eligibility

&

Practice Case Component

Practice Case: Meet Your Client

Welcome to the SOAR Online Course Practice Case. This component of the course provides a unique opportunity to put into practice the SOAR techniques you are learning.

INSTRUCTIONS:

1. You will play the role of a caseworker assisting a **fictional** SSI/SSDI applicant.
 - On each Practice Case page (located at the end of every class) you will learn more about your applicant via interview videos, progress notes and medical records.
2. With the information you gather, you will **complete five (5) SSA forms and write a Medical Summary Report (MSR)**.
 - NOTE: Use ONLY the SSA forms provided below as they are fillable versions created specifically for this course.**
3. On later Practice Case pages, you will be prompted to complete the forms/write the MSR and add them to Your Practice Case File.
 - At the end of Class 7**, you will submit your complete Practice Case File to the SOAR TA Center for review.

Ready? Here we go...

Your name is "Will Jones" from XYZ Community Mental Health Center and you are assisting "Collette Rose" to apply for SSI/SSDI. Watch the interview video below to meet Collette and begin to gather information about her.

Practice Case Instructions

To add completed forms/documents to your Practice Case File

- Click "Choose File" to find and select the file on your computer, and then click "Upload."
- Click "Save and Continue" to proceed to next class.
- You will submit your complete application packet to the SOAR TA Center at the end of Class 7.
- All blank SSA Forms are provided in Class 1 Practice Case: Meet Your Client

If you are having any difficulties, please contact us

SOAR Case Study - Female, Part 1





Benefits of the SOAR Online Course

- Standardized training across all geographic areas
- Allows SOAR Leaders to coordinate follow-up training and support
- 20 NASW CEUs
- FREE, web-based, self-guided

<https://soarworks.prainc.com>





Next Steps

- ✓ Learn more about SOAR
- ✓ Coordinate with other agencies in your area
- ✓ Get in touch with your SOAR TA Center liaison
- ✓ Reach out to your local or state SOAR leads
 - <https://soarworks.prainc.com/directory>
- ✓ Register for the SOAR Online Course





Questions & Answers

How can we help?





Connect With Us!

<https://soarworks.prainc.com>



SAMHSA SOAR TA Center

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