

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 SSI/SSDI 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.
- 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 SSI/SSDI applicants

- Identify programs that are currently assisting individuals experiencing or at-risk of homelessness with SSI/SSDI applications. Explore re-allocation of existing resources to incorporate fully or partially dedicated SOAR benefits specialists.
- Identify staff to complete the SOAR Online Course. Provide guidance and support 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 applications they are receiving.

Collaborate, Collaborate, Collaborate

- *Social Security Administration (SSA) and Disability Determination Services (DDS)*. Negotiate a SOAR Process for SSI/SSDI 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 when engaging stakeholders. Include 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); pool and/or realign existing resources; explore local foundations, United Way, corporations, and hospital collaborations; and investigate criminal justice funding to implement SOAR in jails or prisons.