



## SSI/SSDI Outreach, Access and Recovery

for people who are homeless

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### PATH and SOAR: An Effective Partnership

Yvonne Perret, Kristin Lupfer, Margaret Lassiter, and Deborah Dennis<sup>1</sup>

#### Abstract

Projects for Assistance in Transition from Homelessness (PATH) is a key program for adults who are homeless that is administered by the Substance Abuse and Mental Health Services Administration (SAMHSA). SAMHSA also funds the SSI/SSDI Outreach, Access and Recovery (SOAR) Technical Assistance Program. Both programs serve people who have serious mental illnesses and/or co-occurring substance use disorders who are homeless or at imminent risk of becoming homeless. Both programs incorporate essential components to assist adults to recover from homelessness and are complementary to each other. SOAR provides PATH case managers the tools necessary to expedite access to Social Security disability benefits that result in improved housing and treatment outcomes. This issue brief explores ways that PATH and SOAR can—and do—work together.

The PATH and SOAR programs directly complement each other's work. The PATH program's objective to connect individuals to mental health services and stable housing is more easily accomplished when people who are homeless have access to the income and health insurance that comes with Social Security benefits. In addition, both programs are administered by SAMHSA, creating an even stronger link. In more than half of the 47 states that participate in SOAR, the State PATH Contact is also the SOAR Team Lead, resulting in strong collaborations between PATH and SOAR.

Charley Bliss of Georgia, who serves as both the State PATH Contact and the SOAR Team Lead, explains, "Georgia's goal is to end the homeless cycle for individuals enrolled in PATH services. SOAR enables our PATH case managers to expedite access to income and health insurance so that they can connect the individual to mainstream mental health treatment and housing. Since including a SOAR benefits specialist in our PATH Team design, we have significantly improved housing and treatment outcomes for PATH enrolled clients."

SOAR has proven outcomes, which can be replicated with PATH providers. SOAR outcomes show a 71 percent approval rate on initial applications, with an average time period between application submission and SSA decision of 89 days. This compares to an estimated approval rate of 10–15 percent for people experiencing homelessness who do not have anyone to assist them to apply.

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*—Charley Bliss, Georgia State PATH Contact and SOAR Team Lead*

#### PATH

Created through the Stewart B. McKinney Homeless Assistance Amendments Act of 1990, PATH-funded programs exist in all 56 states and territories. These programs provide community-based outreach, mental health and substance use treatment, case

1. Yvonne Perret is Executive Director of the Advocacy and Training Center, Cumberland, Maryland. Kristin Lupfer, Margaret Lassiter, and Deborah Dennis are team members of the National SOAR Technical Assistance Center, operated by Policy Research Associates, Delmar, NY, under contract to SAMHSA.

management and a limited selection of housing services. They also provide other community support services and consumer-directed services. PATH providers partner with medical and other providers to improve access to treatment and other mental health services. The overall purpose of PATH is to assist individuals to engage in treatment and community services as well as to obtain employment and housing so as to recover from homelessness and mental illness.

PATH provides funding to community-based providers for staff, usually case managers, to conduct outreach to individuals in their communities and to serve as liaisons to necessary services. PATH providers take a holistic approach, focusing on each individual's specific needs, including access to income and health services.

## The SOAR Program

The SOAR Technical Assistance Program takes a three-pronged approach to expediting access to the disability benefits programs of the Social Security Administration (SSA). These programs, Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI), provide income and access to Medicaid and/or Medicare for individuals who are eligible. However, the application process is complex and difficult to navigate, especially

for persons who have mental illnesses and who are experiencing homelessness.

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individuals with SSI/SSDI claims the tools they need to complete accurate initial applications that expedite the application process and avoid lengthy appeals.

The second component of SOAR is training for case managers on how to expedite SSI/SSDI claims using the SOAR process. SAMHSA's *Stepping Stones to Recovery* training curriculum walks case managers through this process, covering engagement with people who are homeless, conducting a thorough assessment, the

The first element of the SOAR approach is a state or local planning meeting aimed at creating a community infrastructure that promotes collaboration and communication among key stakeholders, including PATH providers, SSA, the state disability determination service (DDS) agency, homeless service providers, and medical providers. This systems change gives case managers who assist

### PATH-SOAR Collaboration—A Success Story

Manuel was only 5 years old when he was diagnosed with attention deficit disorder. Ten years later, after a lot of turmoil and little treatment, he was diagnosed with bipolar disorder. At age 14, he was arrested and sentenced to a youth detention center. He struggled to manage the rapid changes in his mood and his sentence was continually extended as he repeatedly got into fights. For the next 13 years, he was in and out of detention or prison.

Manuel was released in 2007 with untreated mental and physical illnesses, no money, and no family or community support. He began living on the street and remained there for nearly two years. Life on the street exacerbated his asthma and lack of medical care left his seizure disorder dangerously untreated. Fortunately, a PATH outreach team engaged with Manuel, offered him a room at a nearby hotel, and encouraged him to see a doctor at an outpatient clinic.

In close collaboration with the PATH outreach team, the local SOAR team worked with Manuel to file his SSI application, using all of the SOAR critical components, and it was approved in 53 days. He now receives \$674 a month and has Medicaid benefits. He is off the street and on the road to recovery.

The case managers who worked with Manuel attended a *Stepping Stones to Recovery* training and were supported by their local SOAR project. They learned the critical components to a successful Social Security disability application, including serving as the appointed representative, collaborating with the local SSA and DDS, working closely with community medical providers, ensuring collection of all medical information, and documenting information in a medical summary report.

collection of medical and functional records, accurate completion of application forms, and writing a medical summary report that is submitted as part of the application packet. This report, co-signed by a physician or psychologist who has met with the applicant, addresses the person’s life, treatment history, and functioning as it relates to his or her ability to work.

The third component of SOAR is the ongoing technical assistance provided by the SOAR TA Center. This includes development of tools and publications that may be helpful to communities and case managers, response to technical questions about SSA and its benefits, review of medical summary reports, assistance to states and communities to problem-solve, and suggestions on how to track outcomes.

### PATH-SOAR Collaborations

Several states have used some of their PATH funds and other resources to provide training, staffing, and data

collection efforts using the SOAR model to enhance their work. (See Figure 1.) These collaborations result in access to income and health insurance that individuals need to obtain housing, food, and health care and to meet other basic needs. These collaborative efforts directly contribute to ending homelessness and assisting individuals to rebuild their lives.

More detailed illustrations of the ways in which PATH and SOAR work collaboratively are:

- In **Georgia**, PATH dollars are used to fund a state-level SOAR project coordinator and a team of SOAR benefits specialists. PATH funds were also used to offer a 4-day SOAR Train-the-Trainer program to ensure that all the state hospitals included SOAR trainers to help staff access benefits for individuals prior to discharge. PATH-funded SOAR benefits specialists work in host agencies around the state in cities with large homeless populations. In addition, all PATH

Figure 1. Roles of State PATH Contact (SPC) in State SOAR Programs

ROLE OF SPC IN SOAR	BENEFIT TO STATES	STATE PATH PROGRAMS
Serves as SOAR Team Lead	Coordination of statewide PATH and SOAR efforts	Arkansas, Connecticut, District of Columbia, Florida, Georgia, Indiana, Kansas, Louisiana, Michigan, Missouri, Mississippi, Montana, New Jersey, Oklahoma, South Carolina, Tennessee, Virginia, Wisconsin, Wyoming
Certified SOAR Trainer	Train PATH teams to expedite access to disability benefits	Alabama, Florida, Illinois, Kentucky, Louisiana, Maryland, Michigan, Montana, North Carolina
Incorporates SOAR into PATH contract with providers	Ensures implementation of SOAR model	Michigan, Minnesota, Tennessee, Wisconsin
Uses PATH funding to provide SOAR dedicated staff	Specialized and effective staff roles	Colorado, Georgia, Kentucky, Maryland, Michigan, New Jersey, North Carolina, Tennessee
Provides SOAR training for PATH-funded providers	Increased housing and treatment outcomes	Alabama, Arkansas, Connecticut, Florida, Georgia, Illinois, Indiana, Kansas, Kentucky, Maryland, Michigan, Minnesota, Missouri, Nebraska, New Jersey, North Carolina, Oklahoma, Tennessee, Texas, Virginia, Wisconsin
Coordinates with SSA and DDS	Single point of contact for issues that arise during implementation	Arkansas, Florida, Georgia, Illinois, Kansas, Indiana, Maryland, Montana, Oklahoma, Virginia
Collects and reports on outcomes of SSI/SSDI applications	Evidence for sustainability efforts	Arkansas, Florida, Georgia, Kansas, Maryland, Michigan, Wisconsin, Virginia

providers in the state are SOAR trained and many of the teams have a dedicated SOAR benefits specialist. The SOAR project coordinator plans and conducts *Stepping Stones to Recovery* (SSR) trainings around the state, provides ongoing technical assistance, hosts a monthly SOAR Provider Coalition meeting, e-mails a bimonthly SOAR newsletter, and holds quarterly meetings with state-level SSA and DDS staff.

- In **Michigan**, the State PATH Contact is the SOAR Team Lead. Monica Bellamy has convened regional SOAR planning meetings in communities

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Michigan State  
PATH Contact and  
SOAR Team Lead

across the state, provides ongoing technical assistance, offers *Stepping Stones to Recovery* (SSR) training, and works with the state HMIS (Homeless Management Information Systems) team to track SOAR outcomes. PATH providers in Michigan are required to participate in SOAR as a condition of their contract with the State to provide PATH services. Ms. Bellamy says, “We realized that for our PATH teams to be fully effective at

ending homelessness and connecting persons to needed services, we needed a proven solution for expediting SSI applications for persons identified during outreach. SOAR Across Michigan has been that solution. Every PATH team in Michigan uses the SOAR process, and together the teams have had a significant impact on the number of persons approved for benefits and permanently housed. Each PATH staff has processed a dozen or more applications over the current fiscal year, making a significant impact on the people they serve and assisting them on the road to recovery.”

- The State PATH Contact in **Missouri** used a PATH technical assistance grant to start a SOAR program. With these funds, she held a 2-day strategic planning meeting to begin system collaboration and change, sent trainers to a SOAR Train-the-Trainer program, and brought a member of the national SOAR TA team to observe and provide feedback on the trainers’ initial training. She also hired a SOAR coordinator and is pursuing other strategies to expand SOAR around the state.
- In **Kansas**, the State PATH Contact used multiple funding sources to sponsor a SOAR strategic planning forum in August 2009 and a 4-day Train-the-Trainer program in October 2009 for staff from around the state. Kansas is beginning to work on SSI/SSDI applications and collect outcome data.
- In **Maryland**, the State PATH Contact used PATH funds to hire a SOAR coordinator in Baltimore City, as well as a SOAR data coordinator who will conduct an evaluation of SOAR in Maryland.
- In **Minnesota**, the SOAR Team Lead used state funds (reimbursed by SSA to the state’s interim assistance fund) to enhance staffing on PATH teams to provide SOAR services. Earlier this year, Minnesota held a PATH-SOAR collaboration planning meeting that included representatives from all PATH-funded providers.
- In **Wisconsin**, the State PATH Contact used Mental Health Block Grant dollars to fund Wisconsin PATH providers to offer SOAR services.
- In **Alabama** and **Florida**, the State PATH Contacts are ensuring that all of their PATH providers are SOAR trained.

### For More Information

To find out more about SOAR in your state or to start SOAR in your community, contact the national SOAR technical assistance team at [soar@prainc.com](mailto:soar@prainc.com) or check out the SOAR website at <http://www.prainc.com/soar>.

