



SSI/SSDI Outreach, Access and Recovery

for people who are homeless

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Involving Peer Supports in the SOAR Process

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Abstract

SSI/SSDI Outreach, Access and Recovery (SOAR) is supported by the Substance Abuse and Mental Health Services Administration (SAMHSA) to expedite access to Social Security disability benefits – Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) – for eligible adults who are homeless and who have serious mental illnesses and/or co-occurring disorders. Guidance and support from peers who share common experiences can be invaluable when people are facing such challenges as homelessness, job loss, or periods when they are unable to work. Peer support workers can use their unique insight to more effectively engage people throughout the SSI/SSDI application process. SOAR efforts are enhanced when peers use their lived experience to provide ongoing support to individuals seeking benefits, resulting in improved outcomes.

Peer Supports

It is widely known that peers can complement and increase efficacy of traditional mental health service models by enhancing engagement, rapport, and advocacy based on common experience. Peer support workers don't rely solely on their own experience – they may receive additional training and continuing education on peer-to-peer homeless outreach, Wellness Recovery Action Plans, benefits acquisition, and more. Some peers are state certified and their services are Medicaid reimbursable, while others serve a more informal role in clubhouse settings or drop-in centers.¹

For organizations that participate in SSI/SSDI advocacy, peers can play an important role. Drawing on their own lived experience, peers can provide a unique perspective on the mental health service system, the Social Security Administration (SSA) disability application process, and/or the realities of homelessness to assist others navigating the SSI/SSDI application process.

Peer Support Roles in SSI/SSDI Advocacy

People who are experiencing homelessness or who are at risk of homelessness face numerous barriers to

accessing SSA disability benefits. One of the more common challenges that SSA staff report is keeping in contact with individuals over the course of the SSI/SSDI application process. Peer support workers are able to build rapport with applicants, keep them engaged, and support them throughout the application process, ensuring that individuals are not “lost to the process.”

“I was so nervous and really glad my peer support was there to walk me through the process. As soon as I sat down in front of my Social Security worker, I showed him all of the documentation I had. A slow, happy smile crossed his face and he said that I had the most organized and complete application he had ever seen.” –Consumer

Transportation is also a major barrier for most individuals who are homeless. Peer support workers may provide or assist with accessing transportation to necessary appointments and even accompany individuals who may need this.

¹ Daniels, A., Grant, E., Filson, B., Powell, I., Fricks, L., & Goodale, L. (Ed), *Pillars of Peer Support: Transforming Mental Health Systems of Care Through Peer Support Services*, www.pillarsofpeersupport.org; January, 2010.

Peer support workers in many states have participated in the two-day SOAR training and are actively assisting consumers using the SOAR process in varied capacities. Peer support workers can play a unique role in implementing some of the critical components of the SOAR process, such as engagement and support, compiling a full medical history, and writing a complete medical summary report.

For instance, peer workers who are familiar with local mental health service providers can help individuals to recall their treatment histories and can assist in the collection of medical records. The peer worker may be able to use their own experience and knowledge of the mental health service system to discover past places of treatment if the individual has difficulty remembering his or her medical history.

In many organizations, peer support workers are able to spend more one-on-one time with individuals than traditional clinical staff. This time and attention can help peers see how individuals function on a day-to-day basis with regard to social interactions and completing tasks. These observations are essential when documenting an individual's functioning for the disability examiner.

It is important to remember that some aspects of assisting with SSI and SSDI applications can require special skills, such as the ability to engage others and build relationships or the ability to write clear and succinct functional assessments. Not everyone needs to be able to do all aspects of the SSI/SSDI assistance process; some peers work as part of a team that builds upon the skills of each team member.

Program Examples

BACUP Life Center in Los Angeles, CA. The BACUP Life Center is a mental health advocacy program in Los Angeles, CA, that provides outreach to individuals who are homeless and have a severe mental illness or other disabilities. BACUP staff serve as benefit representatives who assist their clients in the SSI/SSDI application process. Not only do they have lived experiences of mental illness, but they also receive training, including training from the local SSA field office. BACUP staff members like to say, "It's the listening, not the telling," which enables peers to engage and build rapport with their clients.

Benefit representatives use the SSA-1696 Appointment of Representative form, collect medical records, and work with medical providers to facilitate necessary

evaluations. They walk individuals step-by-step through Social Security's online application process and follow the case from initiation to approval, while maintaining ongoing collaboration with the SSA claims representative and Disability Determination Services (DDS) disability examiner. Andrew Posner, Division Director, reports that BACUP's SSI/SSDI approval rate averages 70 percent for the 100 people served per year. He notes that peers can be proficient with the technical aspects of benefit acquisition, but also connect with applicants due to shared common experiences.

Mental Health Association in Atlantic County, NJ.

Jaime Angelini serves as the Community Advocates Coordinator for the Mental Health Association in

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Atlantic County (MHAAC), New Jersey. MHAAC uses Peer Outreach Support Teams to engage individuals who are not connected with traditional mental health services. Peer providers at MHAAC focus on support, education, and advocacy for individuals in the community, including assisting individuals through the SSI/SSDI application process. They initiate the SSA appointment, drive the consumer to that appointment, and accompany them through the entire process. They help the consumer complete all of the necessary forms and build a timeline of his or her treatment and work history. Peer providers are able to say to the individual with whom they are working, "I was once going through this." Jaime reports that approximately half of the applications with which MHAAC peer providers assist are approved on initial application. Those that are denied are referred to a free community health law project for appeal and almost all of those cases are approved on appeal.

Certified Peer Specialists in Atlanta, GA. Rose Hall, a Certified Peer Specialist (CPS) in Atlanta, works for a local behavioral health organization as a community support worker. In this capacity, she is involved with SSI/SSDI applications that often involved multiple appeals and extended wait times. Rose attended a SOAR training

in November 2007. The training counted as continuing education credits for her CPS certification. Rose reflects on her training: “I finally have the tools to work with to get an application complete and approved the first time.” She describes how she works, “I walk consumers through the process and make sure that we are thorough and complete.” She completes the SSA-1696 Appointment of Representative form and the necessary SSA forms with

“I know this was a team effort and I could not have done it without my peer specialist. He talked me through my anxiety and was able to draw on his own experience to help me get over the terror of asking for all those emotional old records.” –Consumer

consumers at their location, requests necessary medical records, accompanies consumers to appointments, and follows up after they are approved to engage representative payees and obtain housing and other support services. Since attending the SOAR training and employing these techniques, every consumer Rose has assisted has been approved for benefits.

Recovery Support Specialists in Oklahoma. The Oklahoma Department of Mental Health and Substance Abuse Services (ODMHSAS) credentials Recovery Support Specialists (RSS) who are in recovery from mental illness or co-occurring substance use disorders and who serve in various capacities at mental health and advocacy organizations. The state sponsors Re-Entry Intensive Care Coordination Teams (RICCT), which include both case managers and RSS workers who help bridge the gap from inpatient to outpatient mental health services. Many of the RICCT teams in Oklahoma have been SOAR trained. RSS workers have often received disability benefits themselves and bring the insight of their lived experiences to the team’s practice of SSI/SSDI advocacy. Jacki Millspaugh, Director of Treatment and Recovery with ODMHSAS, describes the benefits of peer support in the SSI/SSDI application process: “Peers are keeping people engaged in the process—an invaluable benefit.”

The Idaho SOAR Project. Idaho’s SOAR project began in March 2011 and initially trained peer specialists in two programs across the state, Idaho Hope and

PATH (Projects for Assistance in Transition from Homelessness). Idaho’s PATH grant supports two peer specialists in each of seven regions of the state. The Idaho Hope program uses peer specialists to do CTI (Critical Time Intervention) in the Boise Metropolitan area. Heidi Lasser, Program Specialist with the Idaho Department of Health and Welfare, explains that people “feel more comfortable and safe with the peer specialists, knowing they won’t be judged, and as a result often are more open to bringing out the crucial, yet sensitive information needed to complete the SSI/SSDI application in a timely manner.” Heidi shared that the peer specialists in Idaho are very dedicated to the SOAR process and have had great success. As of June 2012, they have had 17 applications approved in an average of 65 days.

Success!

My first SOAR application was approved. What I did was my job. I got to know my peer. It was just that simple. I sat with him and talked. I gathered quotes from him about what he wanted to do with his life.



John McGavick

I asked him questions that were possibly unique, since they were coming from someone who had been there. It all comes down to getting to know who you are working with. Then, you do the best you can to let SSA and DDS also come into the peer’s life.

That is how I did it. It took a total of two months from start to finish – almost 8 hours of filling out forms and data entry. He is happy and loves to play with his dogs. He is being treated with therapy on his Medicaid.

– Idaho PATH Peer Specialist John McGavick

Capital Clubhouse Recovery Center (CCRC) in Olympia, Washington. Stephanie Lane, Program Director of CCRC is a new SOAR trainer. Their SOAR program works closely with their PATH program,

which consists of four peer specialists. They have developed relationships in the community that have facilitated faster response times to phone calls and records requests. The peer specialists work together as a team where no one works on an application alone. Each person brings his or her strengths to help the team deliver a complete application package to SSA.

Modeling Recovery

The SOAR initiative and training curriculum are grounded in the value and reality of recovery. Peer support workers can model recovery and coping skills for the individuals with whom they work. They can demonstrate that recovery from homelessness and mental illness is possible and help individuals consider what life in the community can be for them.

"[Peer specialists] can help the applicant move through the stigma, frustration, and grief of what it means to be currently unable to work for whatever reason."

–SOAR Trainer Stephanie Lane

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 or check out the SOAR website at <http://www.prainc.com/soar>.