



Icebreaker:

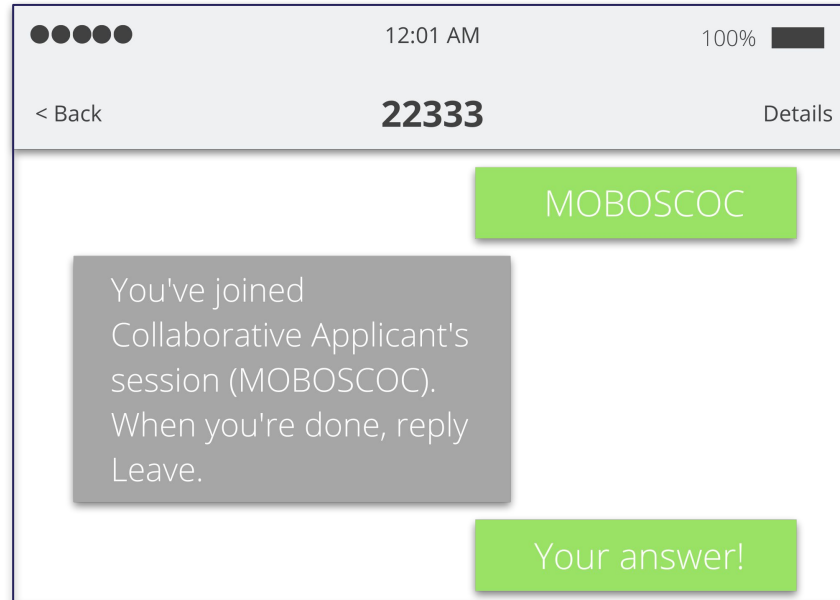
How to Join:

Join by Text



- 1 Text **MOBOSCOC** to **22333**
- 2 Text in your message

What you see:





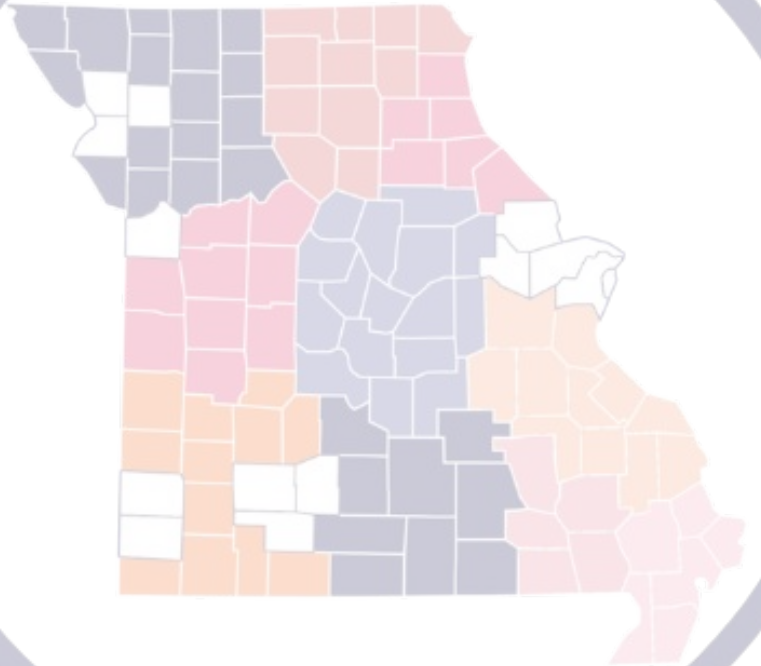
MO BOS COC

Full Membership Meeting

December 1st, 2022

Presented by the Lead Agency:
Community Partnership of Southeast Missouri

moboscoc.org
573-651-3747
40 S. Sprigg Cape Girardeau MO





Welcome To The Full CoC Meeting!

Meeting Etiquette

- Please remain muted during the meeting
- Users will be muted as needed throughout the meeting
- There will be a time of public comment during meeting.
- If you are accessing this meeting via phone, use *6 to unmute
- This meeting will be recorded

Meeting Attendance

[For attendance, please complete this Google Form.](#)

If you are unable to complete this form through Google, please complete [this form](#) on our site.

Meeting Etiquette

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- If you are accessing this meeting via phone, use *6 to unmute



What's the password for? We provide a password for our members to use with MHDC funding. Certain grants require CoC participation. This password serves as the evidence of attendance to this meeting. Keep track of the password received from completing the Form.



Agenda

- Attendance
- Board Updates
- Full CoC Voting
- Committees

◆ 5 minute break ◆

- HMIS Updates
- Lead Agency Updates
- SOAR & Mainstream
Benefits Training
- Q&A/Open Forum





References

Acronyms

Schedule
Voting
Membership

CoC Overview

The Board
Committees
Lead Agency
HMIS Lead

Structure

Regions
Coordinated Entry
Onboarding Document

If you are new to the MO BoS CoC, please refer to our [Full Membership Meeting page](#) on our website!



Martha Sander,
Board Chair



A Word from the Board



Voting

For voting on the topics today we will use Google Forms. If Google Platform does not work for you, please use the forms on our website to cast your vote.

Please ensure that you are the Primary/Secondary voter for your organization.
Each member organization of the CoC may cast 1 (one) vote.





At Large Board Candidates




Lori Concepcion

Lori has over 30 years experience with Housing Authorities, she held multiple positions with various Housing Agencies in NJ, including Assistant Executive Director, Section 8 Director of a Large Housing Authority, Housing Consultant to multiple agencies, executive administration, purchasing, grant writing, and managed multiple public housing projects including senior/disabled housing.

David Henrion

David Henrion has been deeply involved in the homelessness field for the past 7 years. He served as CoC Coordinator for two years for the Greater Lansing Homeless Resolution Network (Lansing's CoC). He was a System Administrator for two years and the HMIS Manager for St. Louis for three years. David has deep knowledge of HMISes, HUD regulations, PIT Counts, and writing NOFO grants.





At Large Board Candidates




Kelli Kemna

Kelli Kemna is the Housing Director for Missouri Department of Mental Health. Kelli administers Department of Mental Health's Shelter Plus Care, Show Me Recovery Housing, VA GPD, Rental Assistance Program, PATH, SOAR and Housing Liaison projects throughout Missouri. Her beliefs make her a champion for housing first. She represents those with mental health, substance use and developmental disabilities.

Mark Kirchhoff

Mark Kirchhoff has served the last 3 years on the MO BoS CoC Board of Directors, representing Region 5. He has been instrumental in the Youth Committee, development of the Qualified Minor Tool and training, FYI Vouchers and the Youth Action Board. He has also worked with our Lead Agency, CPSEMO, to secure our first CoC Youth Homelessness Demonstration Project (YHDP) grant for \$6.86 million dollars.





Voting

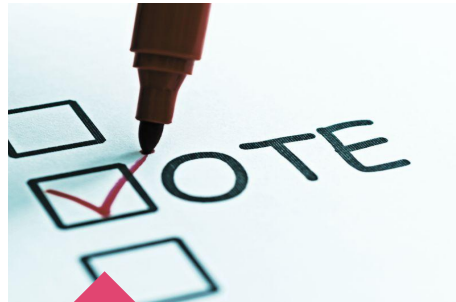
Ratification: [Governance Charter Updates](#)

Election: At-Large Board Members

If you a voter for your agency, select: Ay, Nay or Abstain

[Google Voting Form](#)

If you are not able to vote by Google form, refer to link on our website.



Committees

01. Coordinated Entry

02. Grants

03. Performance

04. Membership

05. Point in Time Count

06. Youth Services

07. Race and Gender Inequities

08. Youth Action Board

09. Veteran Services

10. Victim Services

Workgroup. Board Development





Board Development to be Policy+Planning Committee

Policy and Planning Committee, to develop, revise and execute the policy and planning elements of the CoC.

Chair: Becky Poitras

Meets: 2nd & 4th Tuesdays of the Month @11am



Board Development to be Policy+Planning Committee

Chair: Becky Poitras

Meets: 2nd & 4th Tuesdays of the Month @11am

Goals for 2023

- Review current policies of the CoC and lead annual review of the CoC Governance Charter
- Review and edit new proposed policies for the CoC
- CoC Strategic Planning- develop and propose annual strategic plan to the Board of the CoC, including annual 5-year & 10-year goals

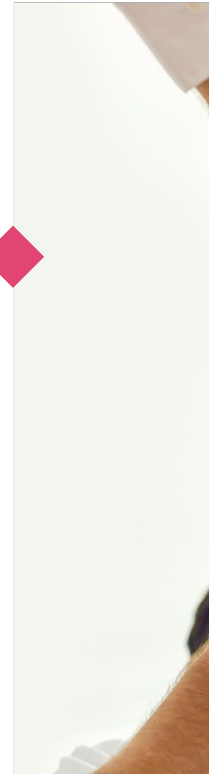
Coordinated Entry Committee

Chair: Maggie Thomas

Meets: 1st Tuesday of the Month @9 am

The MO BoS CoC Coordinated Entry (CE) Committee drafts policies and procedures by which all agencies participating in coordinated entry within the BoS must abide. Works with Coordinated Entry Structure for all agencies in the BoS to participate in.

The CE Committee provides support and advice for regions as they implement coordinated entry and make recommendations to the Board regarding coordinated entry related policies and procedures.



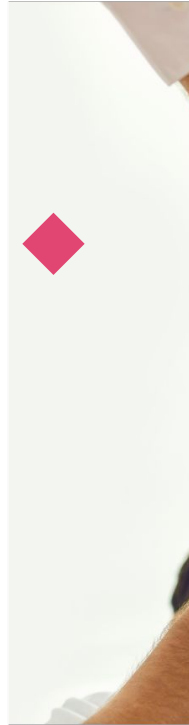
Coordinated Entry Committee

Chair: Maggie Thomas

Meets: 1st Tuesday of the Month @9 am

Goals for 2023

- Review scoring metrics for agencies working in CES for funding opportunities
- Review the Coordinated Entry System Process
- Review training for Coordinated Entry Assessors



Grants Committee

Chair: John Gary

Meets: 1st Thursday of the month @ 9am



The MO BoS CoC Grants Committee is responsible for ensuring that the CoC and funded agencies acquire all appropriate, available funding.

The Grants Committee oversees the development of a fair scoring tool and feedback policy for each funding process so that resources can effectively be distributed throughout the CoC.



Grants Committee

Chair: John Gary

Meets: 1st Thursday of the month @ 9am

Goals for 2023

- Provide guidance on NOFO application process improvement
- Gain membership of non-CoC funded members
- Review scoring metrics for MHDC funding





Performance Committee

Chair: Wes Dent

Meets: 2nd Friday of the Month

The MO BoS CoC Performance Committee is responsible for monitoring the performance of the CoC and the projects that operate within it. The Performance Committee uses the process of reviewing performance data to create strategies to improve performance to ensure the work of the MO BOS CoC meets the high performance standards.





Performance Committee

Chair: Wes Dent

Meets: 2nd Friday of the Month

Goals for 2023

- Review Project Performance and implement the Policy on Performance Improvement
- Improving transparency between Performance and Project review
- Streamline data elements from CES and HMIS



Membership Committee

Co-Chairs: Ann Gosnell-Hopkins & Edwin Cooper
Meets: 3rd Wednesday of the Month @10am

Membership Committee is responsible for collaborating with committees, groups, board and staff and staff on key strategies, challenges and needs in order to provide insights on membership recruitment, engagement and retention

Committee Work

- Develop a plan for recruitment of non-CoC Members
- Identifying the needs of membership and recommend service to meet those needs
- Develop CoC onboarding materials for CoC Members
- Stakeholder Gaps Analysis
- Support Membership





Membership Committee

Co-Chairs: Ann Gosnell-Hopkins & Edwin Cooper
Meets: 3rd Wednesday of the Month @10am



Plans

- CoC Recruitment Material
- Membership Application
- Committee and Regional member information
- Expand Committee membership

Point in Time Count Committee

Co-Chairs: Edwin Cooper & Ann Gosnell-Hopkins

Meets: 1st Thursday of the month @1pm

The MO BoS CoC Point-In-Time Count Committee works with the Collaborative Applicant and HMIS Lead to complete the annual Point-In-Time (PIT) Count and Housing Inventory Count (HIC). Through local leadership, training, and standardization of processes, the Point-In-Time Count Committee enables the CoC to conduct a count of all homeless persons in its geographical area.



Point in Time Count Committee

Co-Chairs: Edwin Cooper & Ann Gosnell-Hopkins

Meets: 1st Thursday of the month @ 1pm

Goals for 2023

- Improvement to Point in Time Count processes and documentation
- Expand informational reach of the PIT Count and its purpose
- Improve training and methods for counting
- Provide guidance and support on annual changes to PIT Count and HIC requirements



Point in Time Count Committee

Co-Chairs: Edwin Cooper & Ann Gosnell-Hopkins

Meets: 1st Thursday of the month @1pm

Leadership PITC 2023: Regional Coordinators

- Region 1: Cynthiana Bishop
- Region 2: Shamarie Johnson/
Stephanie Dunker
- Region 3: Preferred Family
Healthcare
- Region 4: Becky Poitras
- Region 5: April Redman
- Region 6: Keila Marroquin
- Region 7: Tammie Bratton/
Danielle Pemberton
- Region 8: Sharon Cobb
- Region 9: Jennifer Sander
- Region 10: Jaquie West



Youth Services Committee

Chair: Mark Kirchhoff

Meets: 3rd Tuesday of the Month @ 10am

The MO BoS CoC Youth Services Committee works to represent the needs of youth and young adults who interact with the homeless system of care. Through data, collaboration, and partnerships within and outside of the CoC, the Youth Services Committee will ensure fair service for youth within the CoC.





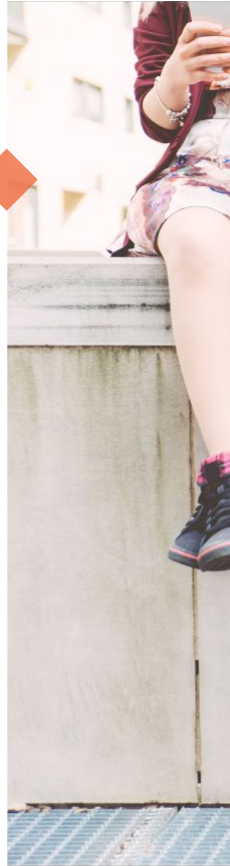
Youth Services Committee

Chair: Mark Kirchoff

Meets: 3rd Tuesday of the Month @ 10am

Goals for 2023

- Access to Qualified Minor Tool Trainings
- Working with Lead Agency to execute YHDP
- Expand general knowledge of Youth services and options



Youth Action Board

Chair: Sterling Waldman

Meets: 1st Wednesday of the Month @4:30



The Youth Action Board (YAB) works to empower youth and young adults, aged 24 and under, by providing a voice and active participation in the decision-making processes of the CoC. The Youth Action Board strives to ensure that the homeless system of care is responsive to the distinct challenges that youth and young adults may face.

Plans for 2023

- Coordinate with Youth Committee and Lead Agency on YHDP
- Improve influence of persons and youth with lived expertise in CoC
- Gain members





Race and Gender Inequities Committee

Chair: Koreena Woodson

Meets: 4th Wednesday of the Month @1pm

The Racial and Gender Inequity Committee works to ensure that inequities that exist within and outside of the homeless system of care are identified and addressed. Through the use of data analysis, collaboration with partners, and focusing on inclusion of people with lived experience of homelessness, the RGI Committee will ensure that representation, treatment, and outcomes among populations are equitable.

Goals: Implementation of Anonymous Feedback Questions, Accessible Diversity Training & Work plan development

Veteran Services Committee

Chair: Glenna Wilson

Meets: 1st Wednesday of the Month @11am

Purpose: Committee formed to work towards the goal of ending Veteran homelessness and addressing specific Veteran needs. The Veteran Services Committee focuses on data for the improvement of Veteran services, connection of resources from all areas of the state to ensure Veterans get connected no matter where they reside and gaining more people with lived experience on our committee.

Goals for 2023

- Gathering data from upcoming PIT
- Gathering Resources for all areas of the COC
- Networking agencies in the CoC



Victim Services Committee

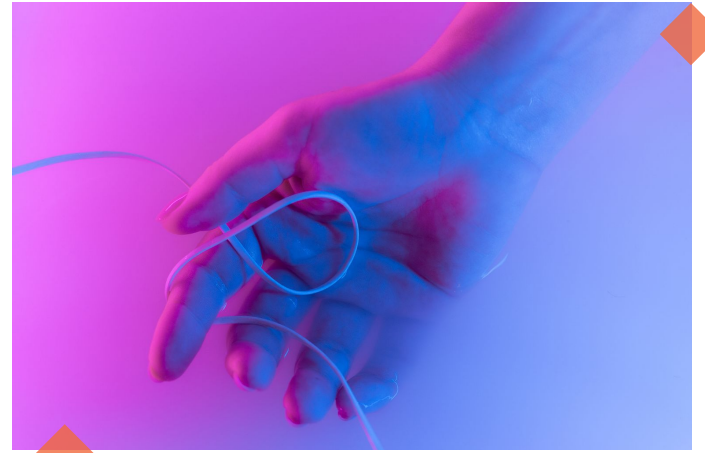
Represents the needs of people fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking or human trafficking.

2023 Committee Leadership

- Chair: Jennifer Sander
- Vice Chair: Lori Haney
- Secretary: Christina Cherry

Committee email:

victim-services-committee@moboscoc.org



Starting in January 2023 meeting with be the fourth Friday of every month from 12pm-1:30pm.

Next meeting: December 15, 2022 @ 12pm

Victim Services Committee

Goals for 2023

- Connecting the Non-HMIS listholders
- Address issues and problems with the Non-HMIS PL
- Connect and onboard shelters not working with CES
- Participate in other committees to Advocate for victims



- Work with the CoC on general education/trainings about domestic and sexual violence to create consistency across the regions



We will have a 5 minute break at this time!

Contest!

Social Media Contest- Follow the MO BOS COC, like, follow and comment, and you will enter a chance to win a \$25 giftcard!



<https://www.facebook.com/moboscoc>

Winners will be announced at the end of the meeting.





HMIS Updates

From the CoC's Lead HMIS Agency:

Institute for Community Alliances (ICA)

Help Desk:

<https://icamissouri.helpscoutdocs.com/>



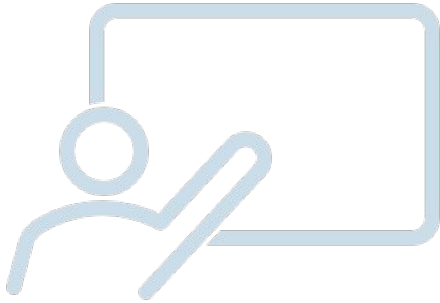
BoS Coordinated Entry Updates

MICHAEL TONARELY

HMIS MANAGER, BALANCE OF STATE

INSTITUTE FOR COMMUNITY ALLIANCES

Upcoming CES User Meeting



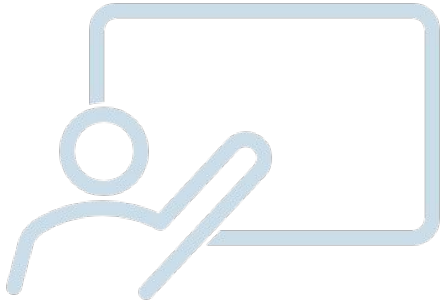
When?

- Wednesday, December 14, 2022 at 2 pm.

What will be covered?

- The ICA BoS team will be reviewing the CE DQ Report, Part 2.

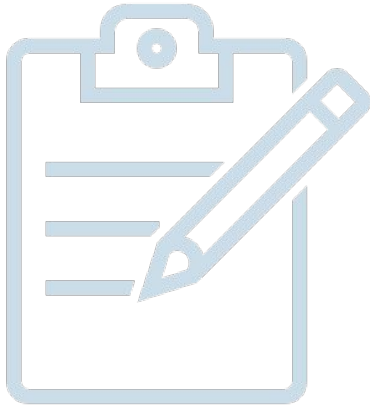
CES User Meeting



Why?

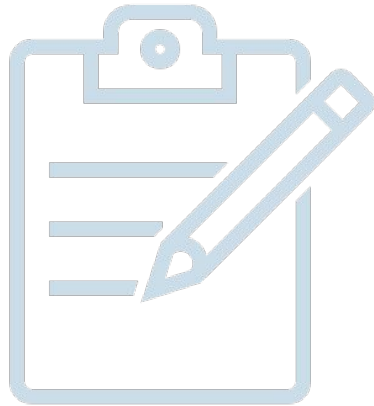
- When doing “DQ checks” the team has noticed errors or missing data that could affect client data on the prioritization list.
- We understand that the DQ reports developed for the CES Access Points are large.
- This meeting will give a chance for the team to instruct users on which data fields are vital for proper prioritization placement of clients.

Race and Gender Inequities (RGI) Feedback Survey



THE RGI Committee, in coordination with the Coordinated Entry Committee developed a Feedback Survey.

- The purpose is to identify disparities in the CE system.
- While it's available outside of HMIS, it is now available within HMIS, as well.



RGI Feedback Survey

Where is it located?

- The Feedback Survey is located on the Entry Assessment, but as a separate assessment.

Entry Assessment

Select an Assessment

<input checked="" type="checkbox"/> MO BoS CES RGI Feedback Survey	<input checked="" type="checkbox"/> ICA Missouri - BoS CoC CES Entry Assessment [2020]
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More information about how this works within HMIS at

<https://icamissouri.helpscoutdocs.com/article/2071-bos-ces-race-and-gender-inequities-surveys>

Lead Agency Updates

Nathaniel Meece, Belle DeLaCruz, Erica Robbins,
Brittany Canales, Melissa Stickel, and more

The Lead Agency serves as the primary point of interaction between all the bodies and various efforts of the CoC network. Our staff are dedicated to making your agencies work well and equipping our whole community with the resources needed to end homelessness in our CoC.

What have we been up to?

- Submitting our Community NOFO applications!
- Applying for and receiving YHDP funds!
- Supporting our partners and members with technical support and guidance
- Reporting on the health and wellbeing of the CoC system.
- Planning for our PIT Count



Lead Agency Updates

Nathaniel Meece, Belle DeLaCruz, Erica Robbins,
Brittany Canales, Melissa Stickel, and more

Where are we going next?

- Crisis Response Gaps Analysis for 2020-2021 system data.
- Creating new improvements to the structure of the NOFO application process.
- Collaborating with Committees to create new review processes and improve our Coordinated Entry System through better coverage, training, processes, and access points.
- Creating a plan for Youth Homelessness (with the Youth Action Board!)
- Building up our team! - We're Hiring!





SOAR and Mainstream Benefits

Speaker: Breita Church

SOAR Case Manager of Community Partnership of
Southeast Missouri

www.cpsemo.org

Breita received her Bachelors of Science from Southeast Missouri State University. After working in the field of social work for several years, becoming part of the CPSEMO team was a natural fit. After completing the adult curriculum for SOAR, she went through the SOAR Leadership training. As the SOAR Case Manager, she has worked with several SOAR thus far.

SOAR (SSI/SSDI Outreach, Access, and Recovery) for Adults Orientation

Substance Abuse and Mental Health Services
Administration
(SAMHSA) SOAR Technical Assistance Center
Policy Research Associates, Inc.

December 1, 2022



SAMHSA
Substance Abuse and Mental Health
Services Administration

The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).

Purpose and Objectives

- Share the importance of Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) benefits
 - Including income, health insurance, education and employment supports, and housing stability
- Offer opportunities for community members to get involved with SOAR
 - Connecting to local SOAR efforts, the SOAR Online Course, and the SOAR Online Application Tracking (OAT) program

What is SOAR?



- A model for assisting eligible individuals to apply for Social Security Administration (SSA) disability benefits
- 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 SAMHSA in collaboration with the Social Security Administration (SSA) since 2005
- All 50 states and Washington, DC currently participate

Supplemental Security Income (SSI)

- Eligibility based on need: low income and resources; living arrangement
- Monthly amount based on Federal Benefit Rate: \$914/month (2023)
- Date of eligibility based on Protective Filing Date/Application Date
- Health insurance: Medicaid

Social Security Disability Insurance (SSDI)

- Eligibility based on insured status (FICA payments)
- Monthly amount based on earnings history
- Date of eligibility based on “date of onset” of disability, 5 month waiting period
- Health insurance: Medicare

SSA's Definition of Disability



Medical
Condition(s)

- Diagnosis
- Documentation
- Duration



Functional
Impairment(s)

- Severity
- Work
- SGA

SOAR Eligibility: Decision Tree



SOAR Eligibility: Decision Tree

SSI/SSDI Outreach, Access, and Recovery (SOAR) is funded by the Substance Abuse and Mental Health Services Administration (SAMHSA) and is a national program designed to increase access to the disability income benefit programs administered by the Social Security Administration (SSA) for eligible adults and children who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder.

Should I complete a SOAR-assisted SSI/SSDI application?

Does the individual (child, youth, or adult) have a disabling condition?

One or more serious mental illness(es), medical condition(s), and/or a co-occurring substance use disorder that meets or equals the [SSA Listings of Impairments](#).

Y

N

Is the individual experiencing or at risk of homelessness?

The SAMHSA SOAR initiative is intended for individuals experiencing or at risk of homelessness. These terms are defined differently by SOAR and the Social Security Administration (SSA). The SOAR model follows the [definitions of "homeless" and "at risk of homelessness"](#) used by the U.S. Department of Housing and Urban Development.

N

Y

Use the SOAR model and all five SOAR Critical Components for assisting with SSI/SSDI applications.

Flag the application as SOAR with SSA and Disability Determination Services (DDS).

Track the outcome of the application in the [SOAR Online Application Tracking \(OAT\)](#) program!

Explore employment support options and other local resources for economic support.

The individual is stably housed and is not receiving a voucher or rental assistance.

Use the Critical Components as outlined in the SOAR model to assist with a quality SSI/SSDI application. Do not flag as a SOAR application with SSA and DDS. Do not track the outcomes in the SOAR OAT program.

SOAR Critical Components

Using these five SOAR Critical Components, case workers play a central role in gathering complete, targeted, and relevant information for SSA and DDS, resulting in high-quality SSI/SSDI applications. These components significantly increase the likelihood of an approval for those who are eligible.

1. Serving as the Applicant's Representative
2. Collecting and Submitting Medical Records
3. Writing and Submitting a Medical Summary Report (MSR)
4. Obtaining a Co-signature on the MSR by an Acceptable Medical Source
5. Completing a Quality Review of Applications Prior to Submission

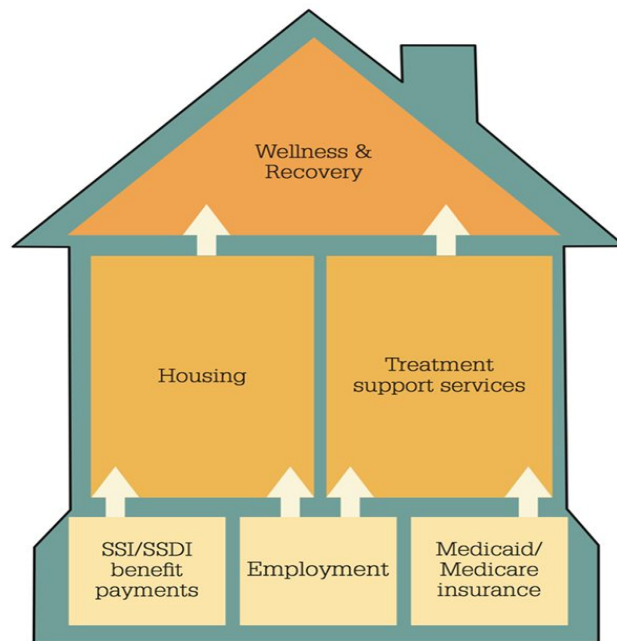
For more information: soar@prainc.com | (518) 439-7415 | soarworks.prainc.com

A Foundation for Recovery and Resiliency

More Than Income

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

SSI/SSDI: One Brick in Foundation



How do States and Communities Benefit?

SSI and Medicaid bring federal dollars into states, localities, and community programs:

- Health providers can recoup cost of uncompensated care.
- States and localities can recoup the cost of public assistance.
- Cash benefits and back payments received by individuals is spent in the local community (*2021: \$564 million**).

* <https://soarworks.samhsa.gov/about-the-model/oat-and-outcomes>

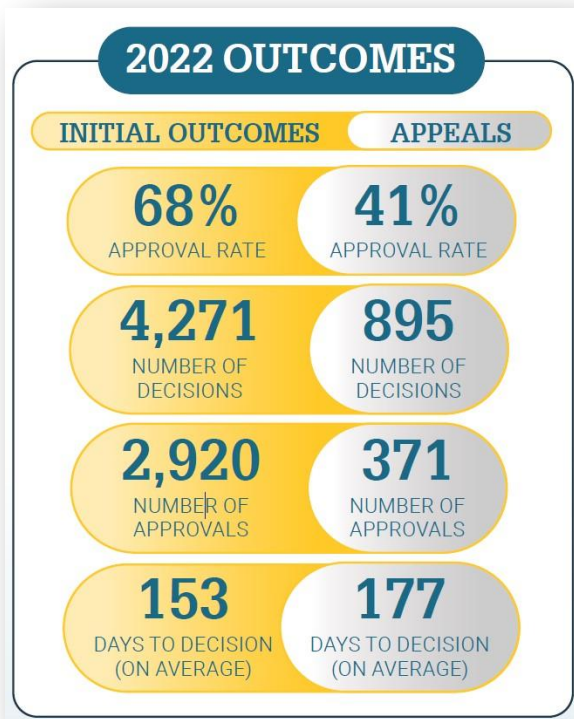
What Makes SOAR Unique?



SOAR-trained caseworkers are the heroes!



SOAR Works!



*National SOAR outcomes as of June 30, 2022

<https://soarworks.samhsa.gov/about-the-model/oat-and-outcomes>

2022 Financial Outcomes

FINANCIAL OUTCOMES

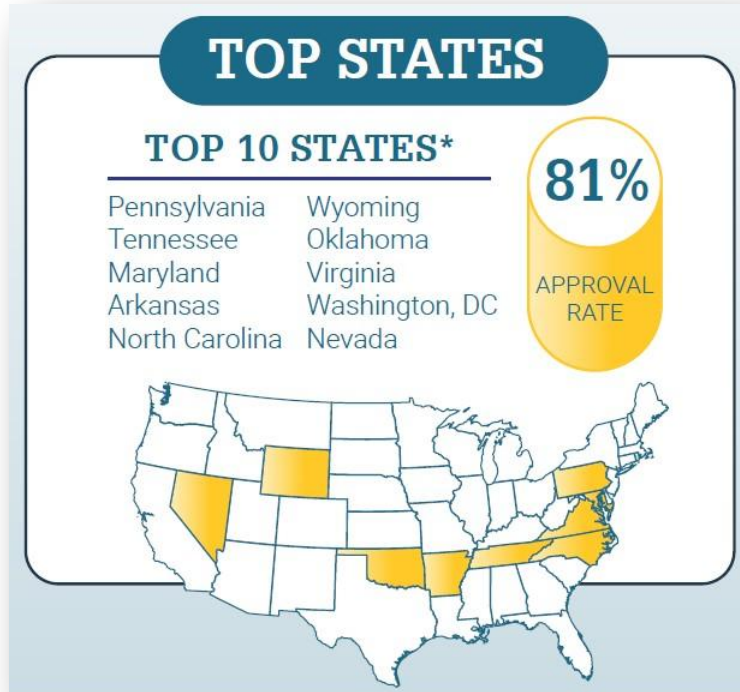
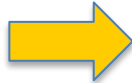
\$25,180 → average Medicaid reimbursement per beneficiary

\$1,686 → average general assistance reimbursement

\$6,552 → average retroactive back payment

\$630M → brought into the economies of participating localities

SOAR Super Stars!



SOAR Critical Components

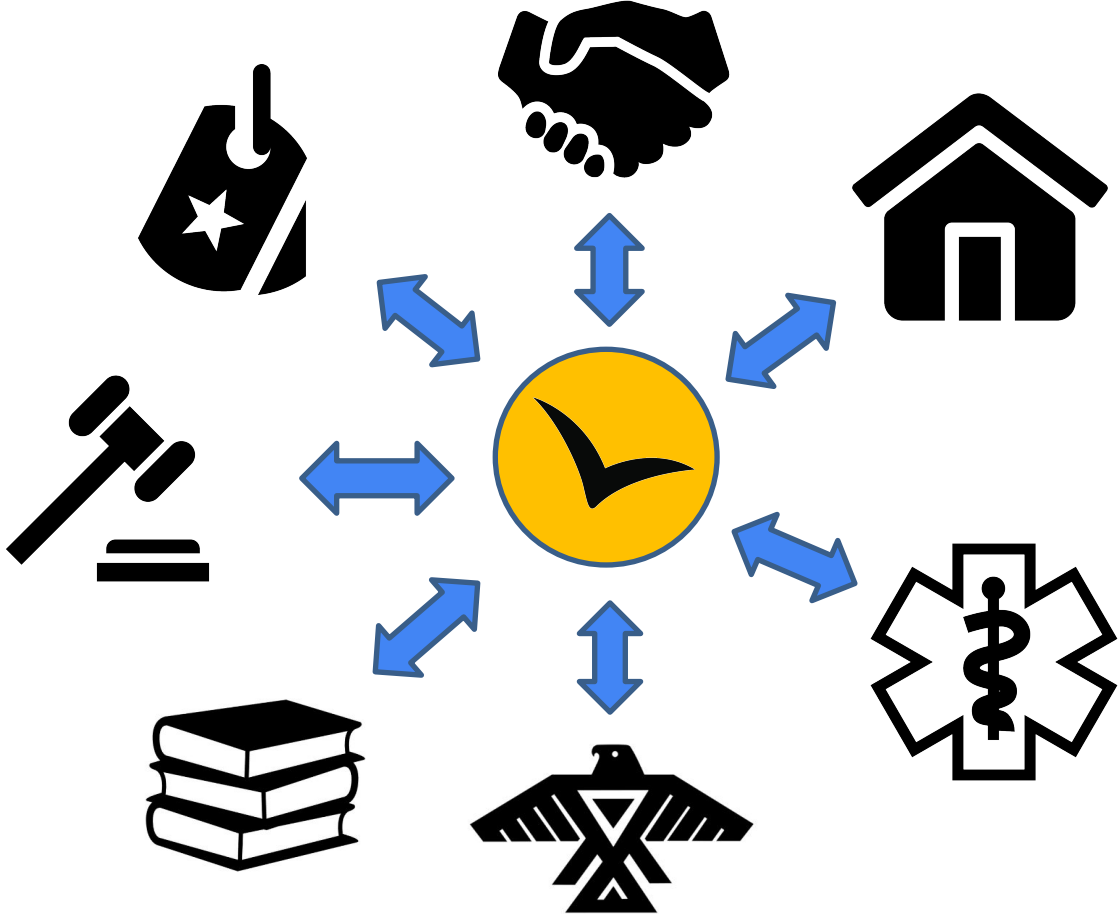
Using these five SOAR Critical Components, case workers play a central role in gathering complete, targeted, and relevant information for SSA and DDS, resulting in high-quality SSI/SSDI applications. These components significantly increase the likelihood of an approval for those who are eligible.

1. Serving as the Applicant's Representative
2. Collecting and Submitting Medical Records
3. Writing and Submitting a Medical Summary Report (MSR)
4. Obtaining a Co-signature on the MSR by an Acceptable Medical Source
5. Completing a Quality Review of Applications Prior to Submission

*Inclusion: Highest cumulative approval rates on initial application for states with at least 300 cumulative decisions, at least 24 decisions in 2022 (2 per month), and a 2022 approval rate above the national average.

Combined, these states had 20,551 decisions

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 Online Course Review Sessions
- 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

*OAT: Online Application Tracking Program

*DDS: Disability Determination Services

*TA: Technical Assistance

Oh, the support you will receive!

SOAR TA Center Activities and Support



SOAR Online Course



SOAR Leadership Academy



SOAR Online Application Tracking (OAT) Program



SOARWorks Library



Individual Technical Assistance



SOARing Over Lunch



SOAR eNews



Bi-Monthly Webinars

Benefits of the SOAR Online Courses

- Standardized training provided across all geographic areas
- SOAR Leaders can coordinate follow-up training and support
- Courses are FREE, web-based, and self-guided
- 20 CEUs from National Association of Social Workers (NASW)



SOAR Online Course: Adult Curriculum

This course trains case workers to assist adults (age 18+) who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for the Social Security Administration's (SSA) disability programs, Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).



SOAR Online Course: Child Curriculum

This course trains case workers to assist children (under age 18) who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for Supplemental Security Income (SSI), a Social Security Administration (SSA) disability benefit program.

SOAR Online Course: Articles and Practice Case

Articles and Content

SAMHSA | SOAR WORKS
Course: **SOAR Online Course: Adult Curriculum** | Exit

Class 01: The Need for SOAR

SSA: What is Disability?

Federal and state agencies, including SSA define the term “disability” in various ways. It is important to understand how SSA defines disability.

Print Page | Acronyms & Quick Facts

Pages in this Course:

- Course Introduction
- 01. The Need for SOAR
 - 01. What is SOAR?
 - 02. Overview of Social Security Disability Programs: SSI and SSDI
 - 03. SSA: What is Disability?
 - 04. Access to SSA Disability Programs: Players, Roles & Tasks
- 05. Steps in the SSA Disability Application Process
- 06. Disability Determination: The SSA Sequential Evaluation
- 07. The SOAR Model: Critical Components
- 08. The SOAR Process: Critical Components in Action
- 09. Definitions of Homelessness
- 10. Identifying SOAR Applicants
- 11. SOAR Values
- 12. Try It! Key Concepts of Class 1
- 13. Class 1 Conclusion
- 14. Meet Your Client - Practice Case

Disability and Work

The Social Security Administration (SSA) recognizes that a person can have a serious illness or condition yet still be able to work. For example, many people with serious mental illnesses in recovery are able to work. Many enjoy the benefits of work, including:

- An income that goes beyond meeting the most basic needs
- A sense of accomplishment and identity
- The satisfaction of being productive members of their communities

SOAR helps people to access SSI/SSDI in the hope they will eventually be able to enjoy these benefits.

SSA's Definition of Disability

The Social Security Administration (SSA) defines disability as:

- The inability to engage in *substantial gainful activity (SGA)*
- Because of *medically determinable physical or mental impairment(s)*
- That has lasted or is expected to last for a continuous period of *at least 12 months OR* is expected to *result in death*

Substantial gainful activity (SGA)

- SSA term with specific criteria and calculations
- Activities that are productive (mental or physical)
- “Gainful” – work activity for pay or profit, even if profit is not realized
- Earnings of **\$1,350/month in 2022**
- SSA and DDS need to know: Can the person work at levels of SGA?

Medically determinable

- Physical or mental health conditions
- Must be documented with clear evidence by an acceptable medical source as defined by SSA

Impaired functioning

Practice Case

SAMHSA | SOAR WORKS
Course: **SOAR Online Course: Adult Curriculum** | Exit

Class 03: Exploring Basic Eligibility

Practice Case: Collect and Review Medical Records

Print Page | Acronyms & Quick Facts

Welcome to the SOAR Online Course Practice Case!

Tasks for this Class:

- Learn about your applicant**
 - View the interview video.
 - Read the progress notes and medical records.
- Begin to fill out forms SSA-8000 and SSA-16**
 - Open the blank forms you saved to your computer on the Class 1 Practice Case page, *Meet Your Client*.
 - Begin to fill in the forms electronically and **save your changes**.
 - You will upload these completed forms on the Class 4 Practice Case page.
- Begin writing the Medical Summary Report (MSR)**
 - Use the MSR Template provided on the Class 1 Practice Case page, *Meet Your Client*.
 - Use the information you have learned about your applicant to begin writing the *Personal History* Section.
 - You will upload the completed MSR on the Class 6 Practice Case page.

Need help? Read our [troubleshooting tips](#) or [watch this video](#) about saving/completing forms. You can also email us at soaronline@wainc.com.

Step 1: Watch the Video

Watch the Interview Video and take notes on what you observe. Come back to this page at any time to view the video again.

SOAR Case Study - Male Part 3 | Watch later | Share

Pages in this Course:

- Course Introduction
- 01. The Need for SOAR
- 02. Initiating the Application
- 03. Exploring Basic Eligibility
 - 01. Exploring Basic Eligibility: "Non-Medical" Information
 - 02. SSA and VA Disability Benefits: Tips for Veterans
 - 03. SSA-16: Application for Social Security Disability Insurance (SSDI)
 - 04. Information Requested on the Online Disability Benefit Application
 - 05. SSA-8000: Application for Supplemental Security Income (SSI)
 - 06. SSA-8000: Living Arrangements
 - 07. Try It! Living Arrangements
 - 08. SSA-8000, Parts 1 & 2: Basic Eligibility and Living Arrangements
 - 09. SSA-8000, Parts 3 & 4: Income and Resources
 - 10. SSA-8000, Parts 5, 6, 7 & 8
 - 11. Class 3 Conclusion
 - 12. Collect and Review Medical Records - Practice Case
- 04. Medical Information
- 05. The Link to Functioning
- 06. Completing the Application Packet
- 07. Supporting Resiliency and Recovery
- Course Completion

Getting Involved: Time Commitment

- Training: 20 hours
- 20-40 hours per complete application
- SOAR Critical Components
- Outcome Tracking
- Benefit to Your Agency and the Individuals You Serve



Getting Involved with SOAR

You want to be a SOAR provider? That's great! Here's what to expect.

SOAR promotes recovery and wellness through increased access to Social Security disability benefits for eligible individuals who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR providers assist individuals with complete and quality applications. This is not an easy task, and we want to be sure that you understand the commitment required – we believe it is well worth the effort!

Training

The SOAR Online Course trains providers to assist individuals with the Social Security disability application process. The course includes an Adult Curriculum for assisting with Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) claims for adults and a Child Curriculum for assisting with SSI claims for children.

- The SOAR Online Course: Adult and Child Curriculums are free and are located on the SOARWorks website (<https://soarworks.prainc.com/content/soar-online-course-catalog>).
- Each curriculum consists of seven classes, each of which has a series of articles, short quizzes, and a practice case component. The practice case provides an opportunity for trainees to apply what they have learned in the course by completing a sample application packet for a fictitious applicant using SOAR techniques.
- It takes approximately 20 hours to complete each curriculum and participants can work at their own pace, starting and stopping as they wish. However, we encourage students to complete the curriculum within 30 days to retain the information learned.
- Upon successful completion, participants will receive 20 CEUs (continuing education units) from the National Association of Social Workers (NASW).

Many SOAR Local Leads offer one-day SOAR Online Course Review Sessions to review key components of the curriculum, discuss local/state practices, and connect new providers to local Social Security Administration (SSA) and DDS (Disability Determination Services) offices.

Time Commitment

We estimate that each SOAR application will take approximately 20-40 hours to complete, from initial engagement to receiving a decision on a claim. This generally occurs over the course of 60-90 days.

- The time spent on each application will vary depending on the amount of engagement that is needed as well as other variables such as the experience level of the SOAR worker. For example, engagement with an applicant who is residing in an institution may take 20 hours, while it may take longer to connect with someone who is living outside or difficult to contact.

SOAR Critical Components

SOAR providers with higher approval rates credit their success to implementing the SOAR critical components³ and submitting high quality applications. Use of these components significantly increases the

Online Application Tracking (OAT)

OAT  **WORKS**
Online Application Tracking


All the reasons
OAT is
awesome!


- Web based
- User friendly
- HIPAA compliant
- Monitors quality
- Takes only 3-5 minutes
- It's FREE!



<https://soartrack.samhsa.gov>

OAT Caseworker Dashboard





Online Application Tracking

Logout

Dashboard Applications Reports Help
Hi, Sarah Smith (Case Worker)

Dashboard

Sarah Smith (Case Worker)
Agency One • Test City • YY

Stats
358 Apps

Created
05/14/2015

Email
ssmith_cw@agencyone.com

ID
12100

My Initial Outcomes

Approvals 75% 174 Approved	Denials 25% 58 Denied	Decisions 233 Total Initial	Days 67 AVG Days
---	------------------------------------	--	-------------------------------

Approvals

YY Approvals 85% 100 Total	National 65% 79034 Total
---	---------------------------------------

New Applicants

Create Applicant

● Required Format: two letters, two numbers, two letters, four numbers. Example: aa11bb2222

Snapshots & Summaries

Monthly Snapshot (September 2022)

9 NEW APPS

Initial 7 Total	ALJ
--------------------	-----

4 APPROVED APPS

Initial 4 Total	ALJ
--------------------	-----

Top CWs last Quarter (Initials)

Sarah Smith

2 Approvals
100% of 2 Total Decisions

Top CWs last Quarter (Appeals)

Reconsideration

Sarah Smith

1 Approvals
50% of 2 Total Decisions

ALJ Hearing

No Results

Pending Applications
All Applications

Application Type

Show 10

ApID	Current App	Status	Days	# Apps	Actions
aa11aa1110	Initial SOAR Application	Denied	0	2	Actions
aa11bb2020	Initial SOAR Application	Archived	-	0	Continue
aa11bb2224	Initial SOAR Application	Approved	62	1	Actions
aa11ss1234	Reconsideration using SOAR	Archived	-	0	Continue
aa12bb1234	Initial SOAR Application	Approved	0	1	Actions
aa34bb3456	Initial SOAR Application	Approved	11	1	Actions
aa34tt5678	Initial SOAR Application	Approved	8	1	Actions
aa57rd1967	ALJ Hearing using SOAR	Approved	25	2	Actions
aa82ba1234	Reconsideration using SOAR	Approved	0	1	Continue
aa85bb1234	Initial SOAR Application	Approved	246	1	Actions

Next Steps

- Learn more about SOAR
- Get in touch with your SAMHSA SOAR TA Center Liaison
- Reach out to your local or state SOAR leads
- Register for the SOAR Online Course

Additional Resources

- SOAR Works Website and Online Course:
<https://soarworks.samhsa.gov/>
- SOAR Outcomes Tracking:
<https://soartrack.samhsa.gov/>
- SSA Disability Information:
<https://www.ssa.gov/benefits/disability/>
- SSA Employment Supports:
<https://choosework.ssa.gov/>

Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

<https://soarworks.samhsa.gov>

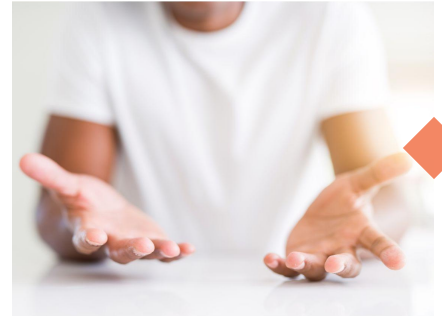
soar@prainc.com

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) • 1-800-487-4889 (TDD)



**Opportunity
for all to
speak**

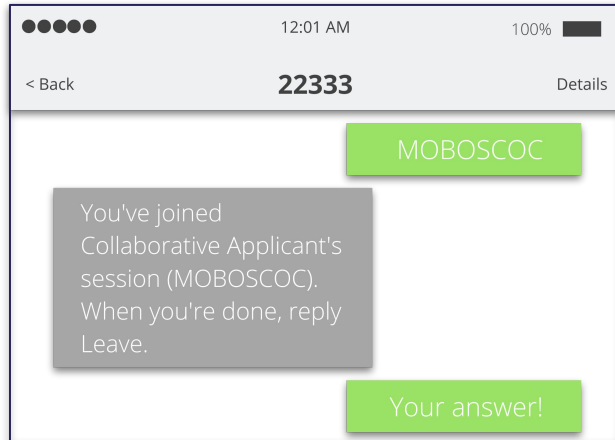


Open Forum

Questions, comment or concerns!
The floor is open!

Open Forum Questions

Refer back to the text message with 22333





THANK YOU

Questions?
Reach out to:
support@moboscoc.org