

## 2014 SOAR Outcomes Summary

SSI/SSDI Outreach, Access and Recovery (SOAR) helps states and communities increase access to Social Security disability benefits for people who are experiencing or at risk of homelessness. Funded by the Substance Abuse and Mental Health Services Administration (SAMHSA), the SOAR Technical Assistance (TA) Center develops and provides training and technical assistance to support the implementation of the SOAR approach.

Since 2006, the SOAR approach has been used to assist more than 42,000 people experiencing or at risk of homelessness with applications for Social Security disability benefit programs—Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).

Of the SOAR-assisted applicants, 65 percent, representing 22,863 persons, were approved for SSI/SSDI upon initial application (Table 1).<sup>1</sup> An additional 3,406 persons, whose applications were denied initially, were approved on reconsideration or appeal (Table 4). Taken together, since 2006, the SOAR approach is responsible for assisting 26,269 persons with accessing Social Security disability benefits.

Decisions on SOAR initial applications were received in an average of 94 days in 2014, a decrease of 6 days from 2013. The SOAR allowance rate has remained constant at 65 percent. This compares to the initial allowance rate of 26.7 percent for all persons aged 18–64 who applied for SSI in 2012.<sup>2</sup>

We estimate that in 2014 alone, SSI/SSDI for the individuals served by SOAR brought over \$227 million into the economies of participating states and localities. In addition, states report that through SOAR they are

- **Serving individuals who are chronically homeless.** Based on data from 29 states, the individuals served had been homeless for an average of three years.
- **Increasing access to housing.** Twenty-four states report collaborations with supportive housing providers, six of which are new in 2014. Eighteen states report that 50 percent of SSI/SSDI applicants were housed within an average of 23 days.

### SOAR Super Stars for 2014

- **Top approval rates.** A “Top Ten” ranking requires that states reported outcomes in 2014 and had at least 100 cumulative decisions since 2006. In order of average approval rate, the Top Ten states are Pennsylvania, Tennessee, Maryland, Washington, North Carolina, Kansas, Oregon, Arkansas, Virginia, and Oklahoma.

- **Consistent capacity.** Eleven states have consistently reported over 100 decisions each year for the past three years. They are Arkansas, Maryland, Michigan, Nebraska, North Carolina, Ohio, Oregon, Pennsylvania, Tennessee, Utah, and Virginia.
- **Most improved.** Florida, Louisiana, and Mississippi show the most improvement in total decisions and approvals in 2014 from what they reported in 2013.

### Sustainability

Eighteen states report success in sustaining current or securing new funding for their SOAR programs, including

- The creation of 10 full-time SOAR positions and 5 half-time SOAR positions.
- Legal Action of Wisconsin contributed \$25,000 to implementing SOAR in Wisconsin using Cy Pres funding.
- North Carolina secured funding for 5 new dedicated SOAR caseworker positions throughout the state, bringing the total to 25 full-time dedicated SOAR workers.
- Maryland secured continuing funding for 5 SOAR dedicated case managers and used funding from its Alcohol Tax Appropriation for its Homeless Identification Project to assist people in obtaining identification documents and access to services.

### Implementation of Critical Components

States with higher approval rates credit their success to implementing SOAR’s critical components<sup>3</sup> and their attention to submission of high quality applications. The five SOAR critical components of application assistance are (1) use of the SSA-1696 Appointment of Representative form, (2) collection and submission of medical records, (3) submission of a Medical Summary Report, (4) physician co-signatures on Medical Summary Reports, and (5) quality review of applications prior to submission. Use of these components statistically increases the likelihood of an approval on initial application for those who are eligible.<sup>4</sup>

<sup>1</sup> The SOAR TA Center requests voluntary submission of SOAR outcomes from states annually from July 1 through June 30 of each year. Unless otherwise noted, these are the data reported in this issue brief.

<sup>2</sup> SSI Annual Statistical Report, 2013. SSA Pub. No. 13-11827. Washington, DC: SSA, September 2014

<sup>3</sup> <http://soarworks.prainc.com/article/soar-model-key-components>

<sup>4</sup> Based on data from January 15, 2005, to February 14, 2014, extracted from the SOAR Online Application Tracking (OAT) system. Data includes 4,200 application outcomes from 35 states.

Paying attention to SOAR critical components has other benefits as well:

- **Better communication with SSA and DDS.** Based on data from 44 states (representing 5,793 applications), 66 percent of applications were submitted using the

**Table 1. 2014 SOAR Assisted Initial Application Outcomes**

State	Locality	2014 Decisions	2014 Approvals	2014 Allowance Rate	2014 Average Days	Years of Data	New Cumulative Decisions	New Cumulative Approvals	Cumulative Allowance Rate
Alabama	Birmingham	8	7	88%	88	6	111	83	66%
Alaska	Multiple sites	19	6	32%	176	6	93	61	66%
Arizona	Maricopa County	15	9	60%	108	4	127	69	54%
Arkansas	State	124	85	69%	42	6	590	457	77%
California	Multiple sites	7	4	57%	103	various	15	9	60%
	Sacramento (SMART)*	382	287	75%	70	4	1706	994	58%
	HOPE San Diego	48	36	75%	84	3	127	87	69%
	Santa Clara*	66	57	86%	N/A	4	141	124	88%
	Ventura County	105	51	49%	132	4	202	111	55%
Colorado	State	80	58	73%	97	various	491	324	66%
Connecticut	State	55	30	55%	127	5	184	119	65%
Delaware	State	0	0	N/A	N/A	6	293	212	72%
District of Columbia	District	31	25	81%	119	4	66	56	85%
Florida	State	492	369	75%	58	various	3155	2124	67%
Georgia	State	89	80	90%	78	6	2032	1144	56%
Hawaii	State	5	5	100%	135	3	29	25	86%
Idaho	State	20	13	65%	88	3	98	52	53%
Illinois	State	23	19	83%	75	4	118	85	72%
Indiana	State	0	0	N/A	N/A	6	20	18	90%
Iowa	State	17	11	65%	126	4	56	41	73%
Kansas	Multiple sites	41	36	88%	130	5	549	443	81%
Kentucky	Multiple sites	98	39	40%	139	7	750	480	64%
Louisiana	Multiple sites	93	80	86%	140	5	247	156	63%
Maine	State	0	0	N/A	N/A	3	5	5	100%
Maryland	Multiple sites	155	135	87%	73	5	515	443	86%
Massachusetts	Boston	2	0	0%	85	5	464	267	58%
Michigan	State	255	153	60%	99	6	2204	1317	60%
Minnesota	State	86	32	37%	167	7	1875	1266	68%
Mississippi	Multiple sites	50	30	60%	30	4	70	38	54%
Missouri	Multiple sites	42	16	38%	107	4	79	40	51%
Montana	Multiple sites	10	5	50%	90	3	98	38	39%
Nebraska	Multiple sites	166	101	61%	64	6	706	407	58%
Nevada	State	13	11	85%	185	6	270	191	71%
New Hampshire	Nashua	0	0	N/A	N/A	3	7	6	86%
New Jersey	Multiple sites	66	38	58%	137	6	350	199	57%
New Mexico	State	81	55	68%	105	6	372	238	64%
New York	Multiple sites	81	69	85%	68	various	908	634	70%
North Carolina	State	317	264	83%	106	8	1130	917	81%
Ohio	State	863	412	48%	54	7	3709	1900	51%
Oklahoma	State	79	70	89%	N/A	7	661	477	72%
Oregon	BEST Portland	209	146	70%	74	7	1054	820	78%
	Multiple sites	0	0	N/A	N/A	5	182	92	51%
Pennsylvania	Multiple sites	47	34	72%	51	5	132	86	65%
	Philadelphia (HAP)	158	150	95%	43	7	1343	1330	99%
Rhode Island	State	00	0	N/A	N/A	7	200	154	77%
South Carolina	State	38	21	55%	81	4	92	55	60%
South Dakota	Rapid City	0	0	N/A	N/A	2	71	63	89%
Tennessee	Multiple sites	100	90	90%	80	7	444	353	80%
	Nashville	170	170	100%	37	8	692	678	98%
Texas	State	20	13	65%	128	6	325	219	67%
Utah	State	675	228	34%	184	7	3835	1828	48%
Vermont	State	4	1	25%	45	<1	4	1	25%
Virginia	State	206	149	72%	141	7	873	625	72%
Washington	Vancouver provider	29	17	59%	150	3	60	29	48%
	Veterans	27	22	81%	97	3	227	212	93%
West Virginia	Multiple sites	18	9	50%	61	6	52	31	60%
Wisconsin	Multiple sites	83	45	54%	113	5	777	530	68%
Wyoming	State	37	25	68%	114	4	138	100	72%
<b>TOTALS</b>		<b>5,905</b>	<b>3,818</b>	<b>65%</b>	<b>94</b>		<b>35,124</b>	<b>22,863</b>	<b>65%</b>

\*includes reconsiderations and appeals

SSA-1696 Appointment of Representative Form as recommended by SOAR.

- Fewer consultative exams. Of those applications, only 14 percent required a consultative examination.

### Working with Veterans

SOAR worked closely with the Veterans Administration and state and local Veteran initiatives to ensure those eligible for SSA benefits were able to apply:

- Twenty-nine states report assisting Veterans with their disability applications.
- Approximately 320 Veterans were helped with their applications using SOAR.
- 2014 saw an increased collaboration with the Supportive Services for Veteran Families (SSVF) program. In July 2014, we found that almost half of the 319 SSVF provider organizations used SOAR as part of their outreach to Veterans.

### Collaborations

All 50 states report collaboration with the SAMHSA Projects for Assistance in Transition from Homelessness (PATH) program:

- Dedicated benefits specialists on PATH teams
- SOAR training for PATH outreach and case management staff
- State PATH contacts serve as SOAR coordinators and trainers

SOAR continues to be an essential part of the plans and activities of HUD’s Continuum of Care (CoC) Program. CoCs have begun including SOAR factors in centralized intake and coordinated assessment systems in addition to ensuring that SOAR services are available in the continuum. Since 2012, 26 CoCs have received targeted SOAR technical assistance and five additional CoCs are expected to be added in 2015.

Eighteen states report collaborations with employment and/or work incentive programs. Seven of these were new in 2014: Alaska, Arkansas, Louisiana, Ohio, Pennsylvania, Tennessee, and West Virginia.

Twenty-three states report collaborations with TANF providers and/or General Assistance programs.

Twenty-three states report collaborations with hospitals, including some or all of the following:

- Agreements with medical records departments for expedited records at no cost
- Easy access to needed assessments
- Dedicated benefits specialist positions within the hospital

- Grant funding to support local SOAR programs
- Discharge planning in state hospitals

Twelve states report collaborations with corrections, including

- Jail in-reach and collaboration with parole and probation to coordinate services
- Jail diversion programs
- Pre-release projects in conjunction with county jails
- Training in state departments of corrections
- Two programs, one in Miami, Florida, and one in Ossining, New York, report a combined total of 147 decisions in an average of 25 days with an allowance rate of 90 percent.

### Cost Savings

Once an individual is approved for SSI and Medicaid, treatment providers can retroactively bill Medicaid for services provided up to 90 days prior to the SSI protective filing date. This results in reimbursement for previously uncompensated care as well as payment for ongoing treatment. Ten states report \$1.65 million in Medicaid reimbursement, or an average of \$10,465 per person, as a result of SOAR (Table 2). Some states participate in Medicaid’s Administrative Claiming (MAC) program, which helps to defray the cost of certain administrative activities related to providing Medicaid services.

**Table 2. 2014 Medicaid Reimbursement**

State	Locality	Medicaid Reimbursement	Number of People Reimbursement Based On
Alaska	Anchorage, et al.	\$9,261	1
Arkansas	Clinton, et al	\$900	1
	LRCMHC	\$41,483	11
Florida	Circuits 15 and 19	\$1,040	1
	Park Place	\$3,009	1
	Fort Pierce (OAT)	\$1,040	1
Georgia	Region 5	\$721	10
Kansas	Leavenworth	\$7,790	1
	OAT	\$99,435	18
Missouri	PATH	\$274,587	17
Nebraska	Southeast Nebraska	\$4,085	1
	Center Pointe	\$5,327	1
	Northeast NE	\$3,700	1
North Carolina	Regional Med Center	\$197,000	52
	Duke Hospital	\$551,482	14
	Center Pointe	\$201,244	9
	WakeMed Hospital	\$250,000	15
Tennessee	OAT	\$1,140	1
Washington	OAT	\$197	2
<b>Totals</b>		<b>\$1,653,440*</b>	<b>158</b>

\* Per person average reimbursement: \$10,465

Some communities offer people who are disabled and have low incomes a monthly cash stipend to help cover essential living expenses while they apply for SSI. This general or interim assistance is provided while the SSI application is pending. Once approved, the state or county is reimbursed

out of the individual's SSI retroactive payments for the income provided (Table 3). Communities can use these funds to support others who need assistance or to fund SOAR efforts to transition people from public assistance to SSI. Communities were reimbursed, on average, \$1,217 per person approved for SSI.

**Table 3. 2014 General/Public Assistance Reimbursement**

State	Locality	GA	Number of People
California	San Luis Obispo	\$1,966	3
Colorado	OAT	\$1000	2
Florida	OAT	\$200	5
Kansas	OAT	\$1,979	4
Minnesota	State	\$18,981	8
Nebraska	Center Pointe	\$7,650	1
	NE	\$92	1
New Jersey	Bergen	\$4,410	2
New Mexico	OAT	\$245	4
<b>Totals</b>		<b>\$36,523*</b>	<b>30</b>

\*Per person average reimbursement: \$1,217

**Table 4: 2014 SOAR-Assisted Appeals Outcomes**

State	Locality	2014 Total Appeals	2014 Appeals Approvals	2014 Allowance Rate	2014 Appeals Average Days	Years of Data	2014 Cumulative Appeals Decisions	2014 Cumulative Appeals Approvals	2014 Cumulative Allowance Rate
Alabama	Birmingham	1	1	100%	388	4	4	4	100%
Alaska	State	9	4	44%	160	3	19	8	42%
Arizona	Maricopa Co.	1	1	100%	76	4	49	29	59%
Arkansas	State	10	5	50%	39	4	83	34	41%
California	Multiple sites	19	12	50%	93	3	119	91	76%
Colorado	State	5	3	60%	N/A	5	69	60	87%
Connecticut	State	3	3	100%	187	3	53	17	32%
District of Columbia	State	4	2	50%	78	4	29	17	59%
Florida	State	78	41	53%	53	5	298	160	54%
Georgia	State	11	7	64%	102	4	443	153	35%
Hawaii	State	4	4	100%	226	2	5	5	100%
Idaho	State	13	7	54%	399	3	37	16	43%
Illinois	Cook Co.	1	1	100%	122	3	13	11	85%
Iowa	State	10	7	58%	93	4	32	18	56%
Kansas	State	6	3	50%	132	5	91	61	67%
Kentucky	State	30	12	40%	118	5	214	125	58%
Louisiana	State	15	11	73%	254	4	94	56	60%
Maryland	State	36	30	83%	92	5	153	117	76%
Massachusetts	State	1	0	0%	88	1	1	0	0%
Michigan	State	21	18	86%	307	5	650	444	68%
Minnesota	State	20	3	15%	217	4	54	313	580%
Mississippi	State	2	2	100%	N/A	3	7	3	43%
Missouri	State	4	2	50%	60	4	14	11	79%
Montana	State	1	1	100%	60	3	38	17	45%
Nebraska	State	50	20	40%	48	5	284	126	44%
Nevada	State	4	4	100%	N/A	4	119	95	80%
New Jersey	State	15	13	86%	54	5	115	73	63%
New Mexico	State	18	8	44%	140	4	55	22	40%
New York	State	9	8	89%	630	4	18	11	61%
North Carolina	State	83	59	71%	N/A	5	337	257	76%
Oregon	Portland	90	40	80%	N/A	5	356	185	52%
Pennsylvania	State	121	60	50%	27	1	121	60	50%
Rhode Island	State	0	0	N/A	N/A	3	167	103	62%
South Carolina	State	21	7	33%	72	3	43	19	44%
Tennessee	State	5	3	60%	76	4	16	9	56%
Texas	State	5	3	60%	72	2	18	9	50%
Utah	State	0	0	N/A	N/A	3	1585	497	31%
Virginia	State	35	17	49%	221	5	143	80	56%
West Virginia	State	8	5	63%	49	3	77	20	26%
Wisconsin	State	20	9	45%	293	4	138	69	50%
Wyoming	State	0	0	N/A	N/A	3	5	3	60%
<b>Totals</b>		<b>789</b>	<b>436</b>	<b>55%</b>	<b>119</b>		<b>6,164</b>	<b>3,406</b>	<b>55%</b>

<sup>5</sup> [http://www.ssa.gov/appeals/DataSets/01\\_NetStat\\_Report.html](http://www.ssa.gov/appeals/DataSets/01_NetStat_Report.html)

## Hearings and Appeals

States are increasingly using the SOAR approach to assist with applications in the appeals process, both for reconsiderations and hearings by an Administrative Law Judge (ALJ). The number of states using SOAR at the appeals level and tracking their outcomes has nearly tripled since 2010. In 2014, 789 SOAR-assisted decisions were rendered at the appeals level, with 55 percent of all reconsiderations or ALJ hearings resulting in an allowance (Table 4). SOAR assisted appeals take an average of 119 days compared to the national average of over one year.<sup>5</sup>

## For More Information

For more information about SOAR or the SOAR Technical Assistance Center, go to <http://soarworks.prainc.com> or email [soar@prainc.com](mailto:soar@prainc.com). Follow us on Facebook at <http://www.facebook.com/soarworks> or on Twitter @soarworks.