



Working Together to Increase Income Stability: The National SOAR and IPS CABHI Pilot

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Agenda

- Background on SOAR
- Integrating SOAR and IPS
- SOAR and Employment Basics
- National SOAR and IPS CABHI Pilot
- Questions

SOAR Technical Assistance Initiative

- SOAR – SSI/SSDI Outreach, Access & Recovery
- Focuses on people who are experiencing or at risk of homelessness
- A model for assisting individuals to apply for Social Security disability benefits
- Sponsored by the Substance Abuse & Mental Health Services Administration (SAMHSA) in collaboration with SSA since 2005
- SOAR is active in all 50 states; no direct funding is provided to states

Changing Lives Since 2005

- 27,226 persons experiencing or at risk for homelessness have been approved on initial application
- 65% approval rate overall, in an average of 81 days in 2015
 - Compares to 10-15 percent for unassisted applications from people who are homeless and 28 percent for all applicants
- Appeals can take a year or more; many people give up and do not appeal
- Estimate that in 2015 alone, SSI/SSDI for the individuals served by SOAR brought nearly \$275 million into the economies of participating states and localities.

SSA Definition of Disability

- For SSI/SSDI, the applicant needs to show:
 - Evidence of a physical or mental health condition, which results in functional impairments that limits his/her ability to work at a substantial gainful level (quantified as \$1130/month in 2016)
 - That the disabling condition has lasted, or is expected to last, for 12 months or end in death
- Why is the applicant unable to work and earn \$1130/month?



Integrating SOAR and IPS

What We Know...

- Many people with serious mental illness, substance use disorders, or co-occurring disorders, who are homeless or at risk of homelessness, want to work and can work
- When determining disability, SSA does not consider how an applicant would function in a job with supportive services such as IPS or even job accommodations provided in the Americans with Disability Act (ADA)

What We Know...

- SOAR principles include:
 - SSI/SSDI benefits are a stepping stone to recovery
 - Respects individual choice
 - Offers benefits planning, e.g.) SSI/SSDI and employment to maximize both earned and unearned income
- IPS principles include:
 - Open to anyone who wants to work
 - Client preferences guide decisions
 - Benefits planning to maximize earned income and unearned income

SOAR and IPS Programs: Join Forces

What do we need to do to create an integrated system?

1. Build on shared principles: employment services and mental health services are integrated, trained staff discuss possibility of work early, offer benefits planning, etc.
2. Cross-training in both SOAR and IPS
3. Promote within coordinated access system for assessment and referrals
4. Establish buy-in across service delivery system

SOAR and Employment Basics

Common Myths

- If you work, your SSI/SSDI application will be automatically denied
- Benefits and health insurance end immediately when you start working
- You can only work part-time while receiving disability
- If Social Security knows you are working, they will say you aren't disabled anymore

While applying for SSI/SSDI

You can work during the application process

SSA looks at the type and amount of work

- Earn up to \$1,130/month (2016)

Strategy: Encourage work from the start

- Can help to strengthen the application
- Might find that supported employment works better for individual

After approval for SSI/SSDI

You can work while receiving SSI/SSDI

Strategy: Connect with work support programs

- IPS supportive employment services
- SSA's Ticket to Work: www.chooseworkttw.net

Strategy: Utilize SSA work incentives

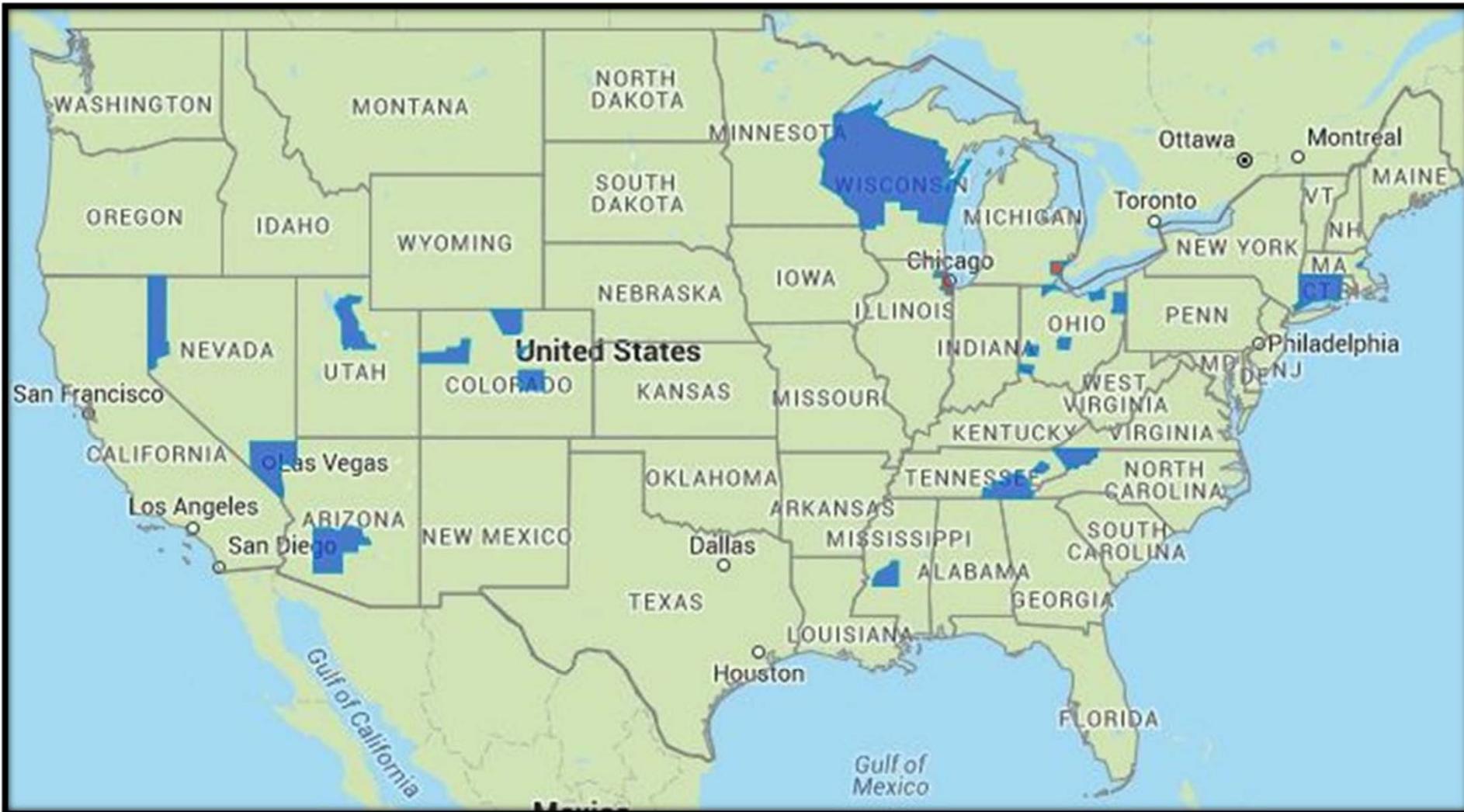
- SOAR Resources on employment and SSA work incentives in the Library at: <https://soarworks.prainc.com>

Start Talking About Work

- Begin the conversations early and have them often
- Remind the individual that it is their decision, let him/her weigh pros and cons
- Provide reassuring and encouraging messages
- Ensure the applicant is equipped with accurate information about working while applying for and receiving SSI/SSDI



National SOAR and IPS CABHI Pilot



Overview and Structure

- 12 State Teams who received the CABHI-States-Enhancement Grant were invited to participate
 - AZ, CO, CT, IL, MA, MI, MS, NV, OH, TN, UT, WI
- Learning Community: Four 90 minute, weekly calls to kick off the pilot (Started May 6)
- Pilot: Monthly check-in calls with pilot participants to report on progress (Starting June 30)

Learning Community Topics

1. SOAR: Identifying applicants and quality review
2. IPS implementation, benefits planning
3. Streamlined referral systems (income needs assessment and employment readiness), Developing a tool for assessment and referral
4. Tracking outcomes and setting up the evaluation criteria for the pilot

Team Composition

1. SOAR State Team Lead and Local Lead
2. CABHI-funded SOAR specialist
3. IPS trainer
4. State CABHI grant administrator
5. SOAR TA Center Liaison

Goals for the Pilot

1. Increase understanding and resources related to working while applying for and after receiving SSI/SSDI
2. Create system-wide assessment and referral procedures and strengthen relationships between SOAR and IPS staff
3. Strengthen data tracking related to income supports from SOAR and employment
4. Demonstrate how SOAR and IPS can form a cohesive and coordinated set of services for income support and housing stability

Pre-Pilot Survey Findings

Pre-Pilot Survey Trends

How SOAR/IPS Integration will benefit consumers:

1. Increases options for maximizing income
2. Gives providers a more structured approach to assisting individuals
3. Enhances connection to the community and improves self-worth for individuals

Strengths:

1. Knowledge and resources of SOAR and IPS staff
2. Potential to increase income supports for individuals

Pre-Pilot Survey Trends

Reported Barriers to Implementation:

1. Misunderstandings about working while receiving disability benefits and fear of work/losing benefits
2. Infrastructure needs (additional staff, tracking mechanisms, staff turnover)

Other trends:

- No states reported individuals having income from employment before or after SSI/SSDI award (*see below)
- States are in the beginning stages of collaboration between SOAR and IPS/employment and many lack formal assessment and data tracking procedures for combined services

Pilot Deliverables and Evaluation

Pilot Deliverables

- Strategic plan for integrating IPS and SOAR implementation, developed by each pilot site in collaboration with the SOAR TA Center
- Assessment and Referral Tool developed by pilot sites in collaboration with the SOAR TA Center
- Final report incorporating qualitative and quantitative findings from the pilot, using data gathered by the SOAR TA Center at pilot implementation, midpoint (6 months), and pilot conclusion (12 months)

Two-pronged Evaluation

- Process
 - What best practices and efficiencies can we identify through the new assessment and referral processes?
 - What systemic challenges do we need to address?
- Results
 - Measured increase in number of individuals exploring work while applying for or receiving SSI/SSDI
 - Increase in number of individuals receiving income from both employment and disability benefits
 - Housing stability of individuals served

Contact Us

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