

Supplemental Security Income (SSI)/Social Security Disability Income (SSDI) Outreach, Access, and Recovery (SOAR) Program Overview

SOAR is a nationwide program designed to help people who are homeless, at risk of becoming homeless and have a disability that is expected to last one year or more, apply for Social Security disability benefits.

SOAR Provider Pay-For-Performance Contract Requirements

Through an RFP process, applicants may be awarded the opportunity to enter into pay-for-performance contracts with DHS. The submitted application and budget will be the basis for the work plan. Awardees will work with DHS’s Social Security Benefits Advocacy and SOAR Team staff to finalize the work plan and contract terms for the grant service period. Awardees must:

1. [Register for a SWIFT Vendor Number](#). Contracted providers MUST have a User ID and Password in order to access and navigate DHS’s payment portal.
2. Complete contract execution. One copy of the original, wet signature is needed by authorizing official before any services can be provided.
3. Comply with insurance requirements. See [Insurance Requirements \(PDF\)](#) for general obligations. Contracted providers must:
 - a. Follow insurance requirements as detailed in the contract.
 - b. Ensure that DHS has is covered by their policies throughout service period.
4. Become Minnesota SOAR-certified. The SOAR contracted provider must:
 - a. Successfully complete [SOAR Works](#), national on-line training sponsored by Substance Abuse and Mental Health Services Administration (SAMHSA) before completing SOAR applications; and
 - b. Submit first three (3) complete Medical Summary Reports (MSRs) to DHS for review and approval within first year of grant and after completion of the online course.
5. Participate in SOAR events and trainings. The provider must:
 - a. Complete SOAR Fundamentals training offered by DHS within the first year of the grant.
 - b. Ensure that all staff providing SOAR services attend a minimum of four (4) trainings per year including relevant conferences, seminars, and webinars. DHS offers approximately six (6) trainings a year on various topics related to SOAR advocacy services.
6. Comply with reporting requirements. Providers must submit invoice and data for each client assisted.

SOAR Program Overview-At-A-Glance

SOAR	
Client Eligibility	Currently homeless, at-risk of becoming homeless, or living in permanent supportive housing, and with documented disability expected to last more than 1 year
Application Levels	<ul style="list-style-type: none"> ▪ Initial application ▪ Reconsideration ▪ Appeal or Administrative Law Judge (ALJ) hearing

Additional Service Levels	<ul style="list-style-type: none"> ▪ Maintain Social Security disability benefits ▪ Maximize benefits ▪ Warm hand-off/referral to another contracted Social Security Advocacy provider
Required trainings	<ul style="list-style-type: none"> ▪ Follow Minnesota SOAR certification process ▪ Complete SOAR Fundamentals training offered by DHS ▪ Attend SOAR trainings and events
Service expectations	<p>Provide intensive services, including:</p> <ul style="list-style-type: none"> ▪ Act as client representative and maintain contact throughout process ▪ Outreach and engagement ▪ In-depth interviews and assessments ▪ Assistance with completing applications and forms ▪ Collecting medical records ▪ Presenting client’s story through Medical Summary Report ▪ Referrals and assistance with accessing other resources
Deliverables	<ul style="list-style-type: none"> ▪ A completed Social Security Disability application with a Medical Summary Report using the SOAR model
Monitoring requirements	<ul style="list-style-type: none"> ▪ Submit invoice ▪ Submit SOAR data tracking form ▪ Submit Medical Summary Report ▪ Maintain client files ▪ DHS may conduct an onsite monitoring visit during grant period

Client Eligibility

SOAR is a service to help individuals apply for or maintain Social Security disability benefits if they are both: (1) homeless or at risk of becoming homeless and (2) have a disability.

Clients must meet all of the following eligibility criteria:

1. Be currently homeless, at-risk of homelessness, or living in permanent supportive housing, according to the following definitions:
 - Homeless: An individual who is living outdoors, on the street, in an abandoned or condemned building, or in a shelter that provides temporary living accommodations; or
 - At-Risk of Homelessness: An individual who: is in a doubled-up living arrangement where the individual's name is not on the lease, is in a boarding house, received an eviction notice, is in a halfway house, is in a residential treatment program, has rent or utilities in arrears, is in transitional housing, is a youth transitioning out of foster care, or is being discharged from an institution or correctional facility without a place to live; or
 - Permanent supportive housing: Living in supportive housing that is designated for individuals who have experienced homelessness; and

2. Must have a physical or mental health impairment that is documented and expected to last more than a year or is likely to result in death; and have significant functional impairments that affect their ability to do substantial work activities; and
3. Are under the age of 65; and
4. Live in Minnesota

Social Security Disability Application and Service Levels

The SOAR contracted provider shall provide the following Social Security Disability application services, if applicable:

1. **Assist with initial applications, reconsiderations, and appeals.** Provide assistance and representation to clients requiring assistance with obtaining Social Security disability benefits at the initial application, reconsideration, or appeal levels (not a common service type for SOAR contracted providers).
2. **Maintain Social Security disability benefits.** Provide assistance and representation to clients in their attempts to maintain their Social Security disability benefits, if the Social Security Administration (SSA) requests a Continuing Disability Review (CDR) or they receive a termination of benefits letter. Clients requiring assistance with maintaining their Social Security disability benefits must meet all of the following eligibility criteria:
 - a. Are homeless or at risk of homelessness, or receiving at least one (1) of the following public assistance benefits:
 - Housing Support (formerly known as Group Residential Housing or GRH)
 - Medical Assistance (MA)
 - Minnesota Supplemental Aid (MSA)
 - Qualified Medicare Beneficiaries (QMB)
 - Service Limited Medicare Beneficiaries (SLMB), or
 - Supplemental Nutrition Assistance Program (SNAP), and
 - b. Are under the age of 65; and
 - c. Live in Minnesota
3. **Maximize benefits.** When a SOAR contracted provider assists an adult client in obtaining Social Security Disability benefits, the provider shall help the client to apply for auxiliary benefits for their dependent children. The Provider will need to submit an application for auxiliary benefits under the parent's claim to obtain Retirement, Survivors, and Disability Insurance (RSDI) benefits.
4. **Referral to Social Security Advocacy or SOAR agency (if applicable).** When a SOAR contracted provider assists a client with a reconsideration and receives a denied claim, the SOAR contracted provider can refer the client to a contracted Social Security advocacy or SOAR agency for representation at an appeal hearing referred to as a "warm hand off." Each agency must agree

on the client transfer and provide the receiving agency with client demographic information and contact information, medical summary report; medical, school, or vocational records, and any other information to assist with the disability claim.

SOAR Provider Service Expectations

The SOAR contracted provider shall provide assistance and representation to clients in their attempts to obtain or maintain Social Security disability benefits. The SOAR contracted provider must follow all Minnesota SOAR procedures and strategies identified below:

1. **Authorized representation.** Complete the Appointment of Representative ([SSA-1696](#)) form and serve as the representative for all of its SOAR advocacy clients.
2. **Outreach.** Provide information about Social Security disability benefits, the application and appeal processes, and other relevant information to prospective clients and communities. The SOAR contracted provider is encouraged to partner with regional coordinated entry systems, county social service agencies, Projects for Assistance in Transition from Homelessness (PATH) agencies, community based organizations, or other organizations to develop comprehensive outreach strategies. DHS encourages use of Evidence Based Practices while engaging with individuals in crisis.
3. **Intensive interviews and assessment.** Interview and conduct a comprehensive initial assessment, applying the appropriate criteria of a client's disability claim under the Social Security disability program. The assessment should focus on learning about the client's physical and mental health conditions, how it affects their current functioning, and ability to work. The assessment will include: physical and mental conditions; information about doctors, healthcare professionals, hospitals and clinics; income and assets; education and training; military service history; employment history; homelessness history; legal history; psychiatric history and current symptoms; substance use; and information about activities of daily living.
4. **Assistance with completing and submitting application materials.** Assist clients with completing and submitting online applications and forms located at <https://www.ssa.gov/forms>, as required by SSA or Disability Determination Services (DDS). This may include attending phone or in-person appointments with the client to complete the application process.
5. **Developing claims.** Identify and collect medical evidence and submit records to the Social Security Administration (SSA) and Disability Determination Services (DDS). This includes collecting the necessary medical, vocational, social service records, functional capacity evidence, and expert testimony that will verify the disability claim and facilitate a decision from SSA. If necessary, assist clients with accessing health services and obtaining any medical evaluations needed to support the Social Security disability claim. This happens at all application levels.

6. [Medical Summary Report](#). SOAR contracted provider will write a comprehensive medical summary report, which incorporates the functional information per the SOAR online training. The SOAR model recommends the medical summary report be co-signed by a qualified medical professional when possible. The SOAR contracted provider must submit a medical summary report with all SOAR applications to DDS. The SOAR contracted provider will submit a copy of the medical summary report to DHS with all invoices.
7. [Collaborate with other service providers](#). Establish relationships with local medical providers, social service agencies, medical records departments, and other local health providers to obtain needed documentation for the disability claim. Maintain communication with all service providers working with clients in order to obtain additional documentation and to complete missing information. The SOAR contracted provider will assist with referrals and any other needed services and resources.
8. [Consultative examination \(if applicable\)](#). If a consultative examination (CE) is scheduled by DDS, the SOAR contracted provider will assist client in preparing for the examination and ensure they have transportation.
9. [Connection to related services and benefits \(if applicable\)](#). Assist clients in applying for public assistance benefits and accessing other resources while they wait for a decision from SSA. Upon approval of Social Security disability, clients should be provided with information on how to apply for other benefits they may be eligible for, particularly Minnesota Supplemental Aid (MSA), MSA Housing Assistance, Medicare, and Medicare savings programs.
10. [Submission of data to DHS](#). SOAR contracted providers are expected to submit client information to DHS

SOAR Service funded Grant Expectations:

In addition to all requirements above and specifics laid in the work plan, grantees awarded one-time service funding during the 1/1/2019-12/31/2020 grant period, are also held to the expectations below.

1. [Onboard Staff](#). Hire staff or update [Position Description](#) (PDF) for SOAR dedicated staff and become Minnesota SOAR certified within first quarter.
2. [Community Planning and Collaboration](#). One of the key components of SOAR is to take a comprehensive community-wide approach to Social Security advocacy services. This requires community-based partnerships, communication, and leadership, as well as collaboration with local Social Security Administration (SSA) offices and county and Tribal nation offices. Agencies funded with the SOAR one-time service funding must attend regional Continuum of Care (CoC) or Minnesota Tribal Collaborative (MTC) meetings at least quarterly.

3. **Quarterly reports.** Awardees will be expected to report actual expenditures quarterly with basic stats. SOAR contracted providers will be paid at least quarterly (in addition to any pay-for-performance payments) based on these reports.
4. **Explore sustainable service funding**
5. **Recommended number of Individuals Assisted.** A reasonable minimum expectation of applications submitted for brand new full time SOAR providers is 10 for year 1 and 20 for year 2. Provider experience with the SOAR model and working with individuals experiencing homelessness, mental illness or co-occurring Severe Mental Illness (SMI) SMI/Substance Use Disorder (SUD) are all items to consider when proposing number of individuals to serve.

Timeline:

Quarter	Payment	Report	Other Expectation
1	Upon receipt and review of expenditure	Quarterly due: 4/30/2019	<ul style="list-style-type: none"> • Services cannot start prior to contract execution • Hire staff (or update FTE% on personnel work plan/job description) • Attend at least 1 local CoC/MTC meeting, • Attend at least 1 DHS-sponsored SOAR TA session • Complete SOAR Online training
2	Upon receipt and review of expenditure	Expenditure due: 7/31/2019	<ul style="list-style-type: none"> • Staff trained & SOAR certified • Attend at least 1 local CoC/MTC meeting, • Attend at least 1 DHS-sponsored SOAR TA session • Submit at least 1 MSR to DHS for review & approval
3	Upon receipt and review of expenditure	Expenditure due: 10/31/2019	<ul style="list-style-type: none"> • Attend at least 1 local CoC/MTC meeting, • Attend at least 1 DHS-sponsored SOAR TA session
4	Upon receipt and review of expenditure	Expenditure due: 12/31/2019	<ul style="list-style-type: none"> • DHS site visit within Year 1 • Attend at least 1 local CoC/MTC meeting, • Attend at least 1 DHS-sponsored SOAR TA session • Submit at least 3 MSRs to DHS for review & approval
5	Pending 1 year review 1/1/2020	Expenditure due: 4/30/2020	<ul style="list-style-type: none"> • Attend at least 1 local CoC/MTC meeting, • Attend at least 1 DHS-sponsored SOAR TA session

6	Upon receipt and review of expenditure	Expenditure due: 7/31/2020	<ul style="list-style-type: none"> Attend at least 1 local CoC/MTC meeting, Attend at least 1 DHS-sponsored SOAR TA session
7	Upon receipt and review of expenditure	Expenditure due: 10/31/2020	<ul style="list-style-type: none"> Attend at least 1 local CoC/MTC meeting, Attend at least 1 DHS-sponsored SOAR TA session
8	Upon receipt and review of expenditure	Expenditure due: 12/31/2020	<ul style="list-style-type: none"> Attend at least 1 local CoC/MTC meeting, Attend at least 1 DHS-sponsored SOAR TA session Host SOAR Overview meeting for your CoC region within grant period

Expectation of DHS

Contracted SOAR providers can expect to receive the following from the Social Security Advocacy team:

- Assigned primary contact for technical assistance
- Training on how to complete SSI/SSDI application so that they meet Social Security Administration requirements
- Payment for their advocacy work
- Development of regional workgroups to identify and address barriers
- Ongoing case consultations and training
- Documentation of successes and identification of areas for improvement and growth
- Collaboration with state and local stakeholders