



## **SOAR Written Standards & Best Practices Guide (SOAR: SSI/SSDI, Outreach, Access, & Recovery)**

The Austin/Travis County SOAR Written Standards are upheld by Ending Community Homelessness Coalition, Inc. (ECHO) and the Austin/Travis County's Homelessness Response System's Leadership Council. These standards were created by the SOAR Workgroup (2024) and the SOAR Local Lead, with input SAMHSA representatives.

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# Introduction

## Purpose

The purpose of this document is to provide SOAR Written Standards and Best Practices for Austin/Travis County organizations participating in the Homelessness Response System (HRS).

## Written Standards and Best Practices

**Best Practices** are ways of doing things that are widely accepted in the field as being the most successful. Best Practices are often thoroughly researched and studied and have been proven effective through significant evidence and data.

**Written Standards** are a set of minimum requirements used as a reference point for organizations/providers involved in the Homelessness Response System. HRS Leadership Council is required by HUD to create and maintain written standards for specific funding sources, including the Emergency Solutions Grant or ESG, and the Continuum of Care Program or CoC. Other funders, such as the City of Austin and some foundations have also required programs they fund to follow the HRS Leadership Council adopted written standards.

This document references both Best Practices and Written Standards to set a foundation of current system-wide practice as well as identify system-wide improvements for SOAR services. The written standards are encouraged for all SOAR services in Austin/Travis County and may be contractually required by certain funders. ***The content in the document should be considered the minimum standard of practice unless specifically noted as best practice.***

## Definition of SOAR

SOAR (SSI/SSDI, Outreach, Access, and Recovery) is a model to assist people experiencing or at risk of homelessness in applying for social security disability benefits. When using the SOAR model, applicants are more likely to be approved and receive benefits within less time than the traditional application process.

## Description of SSI/SSDI

The Social Security Administration (SSA) is the federal agency which administers disability benefits programs. These programs are Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). SSI eligibility is based on the applicants' needs. The Social Security Administration Office examines the applicants' income, resources, and living arrangements for the applicant to meet the financial portion to receive SSI benefits. SSDI eligibility is based on work history and earning records. These disability benefits open the door for individuals to receive income, health insurance, housing, employment, and education. Organizations who provide SOAR services are required to follow the Substance Abuse and Mental Health Services Administration's (SAMHSA) SOAR model, Social Security Guidelines, SOAR Written Standards and Best Practices.

## Eligibility for SOAR

To enroll applicants into the SOAR program, organizations must use the HUD Homeless Definition and the Social Security Administration Definition of Disability for Adults to determine eligibility. If

the applicant is experiencing literal homelessness, organizations must ensure the applicant has completed a Coordinated Assessment (CA).

## HUD Homeless Definition

Experiencing Homelessness	At-Risk of Homelessness
<ul style="list-style-type: none"><li>▪ Lacks fixed, regular, and adequate nighttime residence, <b>or</b></li><li>▪ Will imminently (&lt;14 days) lose primary nighttime residence, <b>or</b></li><li>▪ Unaccompanied youth (&lt;25 yrs.) or families with youth who qualify under other Federal statutes, <b>or</b></li><li>▪ Fleeing domestic violence</li></ul>	<ul style="list-style-type: none"><li>▪ Earns &lt;30% of median family income, <b>and</b></li><li>▪ Insufficient resources/support networks immediately available to prevent homelessness, <b>and</b></li><li>▪ Exhibits 1+ risk factors of homelessness (e.g., recent housing instability, exiting publicly funded institution or system of care)</li></ul>



If an organization providing SOAR services ***does not*** have capacity to serve all eligible people who are experiencing homelessness, applicants should be given priority who currently meet the Category 1 (Individuals experiencing literal homelessness) or Category 4 (Individuals fleeing domestic violence) HUD definitions of homelessness.

## Social Security Administration (SSA) Eligibility Criteria

Applicants must meet the **Social Security Administration’s Definition of Disability for Adults**. All three parts of the definition must apply to potential SOAR applicants to be considered eligible for SSA’s disability programs:

1. The inability to engage in any substantial gainful activity (SGA). SOAR Representatives must look up the current SGA ([Substantial Gainful Activity](#));
2. By reason of any medically determinable physical or mental impairment(s); and
3. The impairment(s) can be expected to result in death, or which has lasted or can be expected to last for a continuous period of not less than 12 months.

## SOAR Training

To be certified to provide SOAR services, individuals must complete SAMHSA’s SOAR Online Course and Training from the SOAR Local Lead in Austin/Travis County.

## SOAR Online Course

SAMHSA offers two different SOAR Online Courses, depending on the population someone works with. Most SOAR representatives will need to complete the SOAR Online Course: Adult Curriculum ([SOAR Online Course: Adult Curriculum | SOAR Works!](#)).

## SOAR Training Timeline

Completing the SOAR Online Course in a timely manner for full-time SOAR employees is essential. Although the course is self-paced, more positive results have been reported when individuals can solely focus on completing the SOAR Online Course without any distraction from starting and stopping the course.

**The SOAR Online Course takes approximately 20 hours to complete. We recommend**



**completing the SOAR Online Course during the first 3-4 weeks of employment to allow time to receive feedback and revise the practice submissions, if necessary. If providing SOAR services full-time, people should begin meeting with potential applicants within [six weeks] of employment. The reviewer (from SAMHSA) has up to ten business days to review the application and notify the trainee if any revisions are needed.**

Potential SOAR Representatives are required to complete all requirements before working with applicants on their disability claim. After passing the SOAR Online Course, all individuals take the SOAR Online Course Review before working with applicants. In addition, SOAR Representatives must attend additional training offered by the Austin/Travis County SOAR Local Lead.

## Ongoing Training

SOAR Representatives must attend ongoing training as determined by the SAMHSA, the State SOAR Lead, and the SOAR Local Lead for Austin/Travis County. SOAR Representatives must regularly refer to SAMHSA and the Social Security Administration's for updated forms needed to complete a SOAR application. The SOAR Local Lead will review applications to provide additional training and technical assistance.



**In order to provide quality SOAR services, providers should engage in the local SOAR meetings and trainings on a consistent basis. The SOAR Local Lead is available for technical assistance, as requested.**

## SOAR Critical Components

SOAR consists of five critical components which differentiate it from the standard way of applying for Supplemental Security Income (SSI) and Social Security Disability Insurance SSDI and increase the chance of the approval rate on the initial claim. In addition, SOAR claims are decided in less time. Using these critical components increases the rate of approval in a shorter time.

**Individuals providing SOAR services in the HRS must include the four critical components:**

1. Serve as the applicant's SSA-1696 appointed representative and regularly communicate with the Social Security Administration and Disability Determination Services (DDS) during the application process.
2. Complete applications for **both** Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).

3. Collect medical records from all providers who have treated the applicant, including an updated Mental Status Exam, for claims that include mental health diagnoses.
4. Write and submit a complete Medical Summary Report (MSR) with each application, and, whenever possible, ensure that the MSR is signed by a medical professional.



**In the ten states who include all the critical components in SOAR applications, there is an 81% or above approval rating. An additional critical component that can be completed is a quality review of applications prior to submission. The SOAR Local Lead can assist in this process.**

## Acceptable Medical Sources (AMS)

SAMHSA provides a list of acceptable medical sources who can sign off on the Medical Summary Report (MSR). An applicant's diagnoses must be documented in medical records, laboratory reports, or other clinical findings as documents by an appropriate medical professional. Applicants have a higher rate of success if they are receiving ongoing treatment. The SSA examiner assigned to the applicant's claim will review the evidence for the severity of the illness, injury, and/or condition.

## Person-Centered SOAR Services

Providing SOAR outreach to our unhoused neighbors results in better outcomes. SOAR Representatives who can adjust to the environment of the applicant and attend appointments with the applicant are able to build a more robust and high-quality application. It is imperative for organizations to allow their SOAR workers to provide community-based services and meet applicants where they are, including visiting encampments, shelters, other community-based environments. Because many of SOAR services are in the community, agencies must ensure SOAR Representatives have the flexibility to spend extended amounts of time at essential appointments and the Social Security office, as needed.

SOAR Representatives must make sure applicants have transportation to doctor visits and disability screening appointments. Agencies providing SOAR services must provide *transportation resources and coordination* to applicants to successfully complete the application process.

## Prioritizing Applicants

Programs that have SOAR funding or capacity within the Homelessness Response System must prioritize SOAR services both before and after moving into housing. Because the SOAR process includes appointments and documentation, projects should begin the SOAR process as soon as the participant is deemed eligible and willing to engage in services.

In the event capacity is limited, enrollments should be prioritized by a combination of the following: highest APAT scores, SOAR eligibility criteria, and applicants that agree to the *Applicant's Buy-In Agreement*.



Individuals who are not connected to a housing program and/or have low APAT scores should also have the opportunity to receive SOAR services. These individuals should be served by projects when capacity allows or need to be connected with a Community SOAR Representative to assist them with a claim. If an agency is referring someone to SOAR services externally, they should provide a warm handoff between the Community SOAR Representative and the potential applicant. For people with high medical needs, the goal is for hospital staff to contact SOAR Representatives when patients who meet the criteria first encounter the hospital, ER, or are admitted. SOAR applications should begin prior to discharge.

## Caseload Size

The SOAR model's intensive engagement process necessitates a lower caseload to provide comprehensive SSI and SSDI application assistance. The focus of this caseload should be on identifying and engaging with appropriate applicants, submitting high-quality and complete applications, and tracking outcomes. Organizations who provide SOAR services will follow the recommended caseloads described below.

## SOAR Representatives Caseload

Full-Time SOAR Representatives will:

1. Have claims assigned on a rolling basis and have an estimated of 7 or more SOAR claims at any given time.
2. Complete approximately 30 or more SOAR applications in 12 months. For new SOAR Representatives, it is expected to complete approximately 25 or more in their first 12 months.
3. SOAR Representatives that do not provide SOAR services as their primary position, must complete at least one application per year to remain active.

## Performance and Outcomes

### Online Application Tracking (OAT)

SOAR Representatives and their supervisors must register for SAMHSA's SOAR Online Application Tracking (OAT) system. SOAR Representatives must track their outcomes before the deadlines in the OAT. OAT uses a secure server and is HIPAA compliant. SOAR certified individuals should record Applicant ID in the case file for cross reference. To register for OAT please visit the following website: <https://soartrack.prainc.com>.

***All individuals who provide SOAR services are required to track data and outcomes in OAT and may be required to also input data into the Homeless Management Information System (HMIS). For Continuum of Care funded projects, SOAR data must also be inputted into HMIS. If agencies are not sure if they should input SOAR data into HMIS, they must contact the SOAR Local Lead and SOAR System Manager.***

The information gathered from OAT can be used by SOAR supervisors to monitor quality SOAR applications as well as to provide additional training as needed.

OAT allows the SOAR Representative and/or supervisor to:

- Track the number of applications submitted.
- Assess the use of SOAR critical components.
- Review SSI/SSDI application approval rates and reasons for denial.
- Measure the time to complete applications.
- View retroactive payment and monthly benefits amounts.

## Performance Outcomes

When the SOAR model is followed (for those eligible), the success rate and time of applicant claims being approved is much greater than traditional application processes. It is imperative that **all** applications marked as SOAR provide accurate documentation and follow the SOAR process to have positive outcomes for those we serve.

Organizations who fall below 40 percent approval rates for all claims combined will be contacted by the SOAR System Manager and/or SOAR Local Lead to collaborate on an improvement plan. The SOAR System Manager or SOAR Local Lead can request information from the organizations to assist in the improvement plan and require additional training, as needed. Approval Rates are reviewed once a year during the same time SOAR OAT reporting is due.

## SOAR Performance Improvement Plan Policy

The SOAR Improvement Policy Plan was created in collaboration with Continuum of Care (COC) governance to ensure SOAR programs follow the fidelity of the SOAR model. This is essential to resolve systemic issues causing denials and longer decision times, ultimately harming potential SOAR applicants. All SOAR programs who provide SOAR services are required to abide by the SOAR Written Standards and policies in the SOAR Performance Improvement Plan Policy.



## Acronyms and Definitions

**SOAR:** SSI/SSDI/Outreach/Access/& Recovery.

**SSI:** Supplemental Security Income.

**SSDI:** Social Security Disability Insurance Program.

**SAMHSA:** Substance Abuse and Mental Health Services Administration.

**SAMHSA SOAR Program:** increases access to Social Security disability benefits for eligible children and adults who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or co-occurring substance use disorder.

**SSA:** Social Security Administration.

**SOAR Representatives:** are individuals who received a certification to provide SOAR services and are in good standing with the SOAR Texas Standards and SOAR Written Standards and Best Practices.

**The Local Field Office:** the Social Security Administration Office in the local area.

**HMIS:** The Homeless Management Information System is a database that collects, stores, and reports information on the Continuum of Care services, outcomes, and clients in Austin/Travis County.

**OAT:** Online Application Tracking is a web-based program in which SOAR certified individuals are required to keep track of their outcomes. OAT uses a secure server and is HIPAA compliant.

**AMS:** stand for Acceptable Medical Source.

**HRS:** Homelessness Response System

**COC:** Continuum of Care

**Community SOAR Representative:** A SOAR representative at an organization that is not tied to a housing project and provides SOAR services to the unhoused community.