

Welcome to your SOAR Online Training!

The SOAR Online Course trains case managers to assist individuals who are experiencing homelessness to apply for the Social Security Administration (SSA) disability programs: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). The techniques taught in this online course can improve the quality and completeness of any application for SSI/SSDI, however, the label “SOAR” should only be used on SSI/SSDI applications for persons who are experiencing or at risk for homelessness.

CLASSES IN THIS COURSE

- ➕ 1. The Need for SOAR
- ➕ 2. Initiating the Application
- ➕ 3. Exploring Basic Eligibility
- ➕ 4. Medical Information
- ➕ 5. The Link to Functioning
- ➕ 6. Completing the Application Packet
- ➕ 7. Supporting Recovery

The online course consists of seven classes, each of which has a series of articles, short quizzes, and a practice case. This practice case provides an opportunity for case managers to apply what they have learned by completing an SSI/SSDI application packet for a fictional applicant using SOAR techniques. Video interviews, medical records, and progress notes provide the information needed to complete five SSA forms and write a Medical Summary Report (MSR) for the fictional applicant.

The Need for SOAR

0:00 / 6:02

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Key Lessons from Will
SOAR helps you get approval on initial applications by helping SSA & DDS with the info they need - avoiding

The complete application packet is submitted to the SAMHSA SOAR Technical Assistance (TA) Center for review. Upon approval, the participant will receive a certificate of completion and 20 continuing education (CE) contact hours from the National Association of Social Workers (NASW). There is no charge for this course.

SOAR Case Study - Female, Part 2

0:00 / 6:02

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Tasks for this Class:

During the course, we will check-in weekly as a group to ask and answer questions, give status updates, and clarify any issues with the training.

Overview of Social Security Disability Programs: SSI and SSDI

[Printer-friendly version](#)

There are two SSA disability programs: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). People often confuse them. Both programs are federally funded and administered by the Social Security Administration.

The Social Security Administration has two disability programs which are federally funded. They are often confused because they have many similarities and some important differences. This article describes the differences between Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).

Similarities

- Medical and functional disability criteria
 - Both programs have the same criteria for determining disability based on medical evidence and functional abilities
- Application process
 - Both programs utilize the same application process, although they have different application forms, and share one disability determination
- Health insurance
 - Each program has an associated health insurance program

After the course, we will hold an in-

person **SOAR Online Course Review Session**, which gives you the opportunity to confirm and clarify information learned online, and discuss local processes and tracking outcomes. Participants will be provided with a materials and tools packet that includes sample SSA forms and key SOAR worksheets and reference documents.

We estimate that it will take approximately 20 hours to complete the entire course and participants can work at their own pace, starting and stopping as they wish.

- **You will be completing two to three classes each week**
- **Please be prepared to set aside roughly 1-2 hours for each class**
- **You will need access to the latest version of Adobe Acrobat Reader or a printer and scanner to complete the training**

As a guideline for the course, and to stay on track, we will observe the following schedule:

Dates	To-Do	Practice Case	Follow-up
<p>Create a SOAR Online Course Account http://soarworks.prainc.com - click "Sign Up" at top right of page.</p>			
Sept. 3-7	Class 1 & 2	<p>Class 1: Download all SSA forms and review the MSR Interview Guide and Template</p> <p>Class 2: Download and review the progress notes; complete and upload the SSA-1696 and SSA-827</p>	<p>Friday Sept. 7th 1pm MT</p> <p>Phone/video conference with SOAR Trainers</p>
Sept. 10-14	Class 3 & 4	<p>Class 3: Download and review progress notes and medical records; begin the SSA-8000 and SSA-16</p> <p>Class 4: Download and review medical records; complete and upload the SSA-8000 and SSA-16; begin the SSA-3368</p>	<p>Friday Sept. 14th 1pm MT</p> <p>Phone/video conference with SOAR Trainers</p>
Sept. 17-21	Class 5, 6, 7	<p>Class 5: Complete and upload the SSA-3368</p> <p>Class 6: Complete and upload your Medical Summary Report (using the MSR Template)</p> <p>Class 7: Review class on SSA work incentives</p>	<p>Friday Sept. 21th 1pm MT</p> <p>Phone/video conference with SOAR Trainers</p>
Sept. 25	Complete practice application	Submit your application packet and complete the course!	SOAR TA Center staff will review practice case materials and respond within 10 business days
Sept. 25-Oct. 8	Revise and resubmit any materials as requested		
Oct. 12	Attend SOAR Fundamentals training via Video Conferencing Equipment (VCE). Location will be provided to registered participants.		
Oct. 15-26	Identify client to assist with SSI/SSDI using the SOAR process. Contact SOAR trainers with any questions as you begin the process.	<p>Friday Oct. 26th 1pm MT</p> <p>Phone/video conference with SOAR Trainers</p>	
Oct. 29-Nov. 9	Discuss progress on SOAR application and any issues that have come up.	<p>Friday Nov. 9th 1pm MT</p> <p>Phone/video conference with SOAR Trainers</p>	

***The course and all practice case materials should be finalized and submitted
NO LATER than September 25th***