

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 fictitious applicant using SOAR techniques. Video interviews, medical records, and progress notes provide the information needed to complete SSA forms and write a Medical Summary Report (MSR) for the fictional applicant.

The Need for SOAR

0:00 / 6:02

Trouble viewing the YouTube video? [Click here to try another version.](#)

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 16 Continuing Education Units (CEUs) 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

Trouble viewing the YouTube video? [Click here to try another version.](#)

Need Help?
Need help using this page, [click here](#) to email us.

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.

After the course, we will hold an in-person **SOAR Fundamentals**

refresher training, 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.

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

We estimate that it will take about 16 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
March 15-April 3: Register for the SOARWorks website and Enroll in the SOAR Online Course: http://soarworks.prainc.com			
Apr. 4-8	Class 1 & 2	Class 1: Download all SSA forms and review the MSR Interview Guide and Template Class 2: Download and review the progress notes; complete and upload the SSA-1696 and SSA-827	Thursday April 7 th 2 pm Phone conference with SOAR Trainer
Apr. 11-15	Class 3 & 4	Class 3: Download and review progress notes and medical records; begin the SSA-8000 and SSA-16 Class 4: Download and review medical records; complete and upload the SSA-8000 and SSA-16; begin the SSA-3368	Thursday April 14 th 2 pm Phone conference with SOAR Trainer
Apr. 18-22	Class 5, 6, 7	Class 5: Complete and upload the SSA-3368 Class 6: Complete and upload your Medical Summary Report (using the MSR Template) Class 7: Review class on SSA work incentives	Thursday April 21 st 2 pm Phone conference with SOAR Trainer
Apr. 25	Complete practice application	Submit your application packet and complete the course!	SOAR TA Center staff will review practice case materials and return them within 10 business days
Apr. 25-May 2	Revise and resubmit any materials as requested		
May 18	Attend SOAR Fundamentals training. 5740 Ralston Ave, Suite 200, Ventura CA		
May 18-31	Identify client to assist with SSI/SSDI using the SOAR process. Contact SOAR trainers with any questions as you begin the process.	Thursday June 2 nd 2 pm Phone conference with SOAR Trainer	
May 31-Jun. 14	Discuss progress on SOAR application and any issues that have come up.	Thursday June 16 th 2 pm Phone conference with SOAR Trainer	

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