

*SOAR Works to End Veteran Homelessness:*  
**VA Caseworker's  
Guide**

*Spring 2024*

*U.S. Department of Veterans Affairs  
Homeless Veterans Program*

Download the guide at  
<https://www.va.gov/HOMELESS/docs/VA-SOAR-508.pdf>

## *Melissa Makes SOAR Work for Veterans Who Are Homeless—And You Can Too.*

**M**elissa is a U.S. Department of Veterans Affairs (VA) caseworker on a mission to end homelessness, one Veteran at a time. Over the years, she's met many homeless Veterans eligible for Social Security income—critical resources to help end their homelessness—whose benefit applications were denied. The reasons were mixed: paperwork was incomplete; there was no mailing address; the application process was complex.



All that changes with **SOAR**: the **S**upplemental Security Income (SSI)/Social Security Disability Insurance (SSDI) **O**utreach, **A**ccess and **R**ecovery program. SOAR training helps VA caseworkers like Melissa, assist Veterans in getting their applications right the first time and increase the chances they'll receive the benefits they've earned.

For eligible Veterans, SSI/SSDI benefits are a critical resource to end and prevent homelessness. With monthly income for housing and living expenses, SSI/SSDI helps Veterans get housed and stay housed. However, Melissa saw too many Veterans become tangled in red tape and denied essential benefits to exit homelessness and sustain permanent housing. So she did something about it: **She trained to become a SOAR provider.** She also earned FREE continuing education credits (CEUs) to advance her career.

Melissa learned how to determine Veterans' eligibility for benefits, manage a case file, save time by compiling medical and other evidence for the application (often tapping VA's electronic records systems) and submit a high-quality SSI/SSDI application packet. SOAR training showed Melissa which forms she needed, how to gather information, where to submit applications and who to talk to if she got stuck. It taught her the process from start to finish so she could keep her Veteran clients informed along the way.

Soon after becoming a trained SOAR provider, Melissa helped a down-on-his-luck Veteran submit an SSI/SSDI application correctly on the first try. Within a few months, he received his first payment. The Veteran became permanently housed, ending three years of homelessness. Thanks to Melissa and SOAR, he has a new lease on life.

Melissa is among the many VA caseworkers using SOAR training to help end and prevent homelessness among Veterans. Any VA caseworker can make SOAR work for Veterans. Learn how with this **SOAR Works to End Veteran Homelessness: VA Caseworker's Guide**, and then use it to put SOAR training into practice on behalf of Veterans.

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\*Please note: The SOAR Works to End Veteran Homelessness: VA Caseworker's Guide is NOT a substitute for SOAR training. It is a tool that SOAR-trained VA caseworkers can use to assist Veterans in applying for SSI/SSDI.

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## What Is SOAR?

Veterans and others with disabilities who are experiencing or at risk of homelessness often struggle to access available resources. The Social Security Administration (SSA) administers two programs that can provide assistance: Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI). These programs have some similarities, but are different in key ways. Each application requires certain documentation; both are complex.

SOAR is a training and technical assistance initiative created by the Substance Abuse and Mental Health Services Administration (SAMHSA) and made available to case managers and social workers across the Federal Government and individual states. SOAR offers free tools and training to VA staff and other caseworkers nationwide to boost access to these benefits for people with disabilities who are experiencing or are at risk of homelessness, including Veterans.

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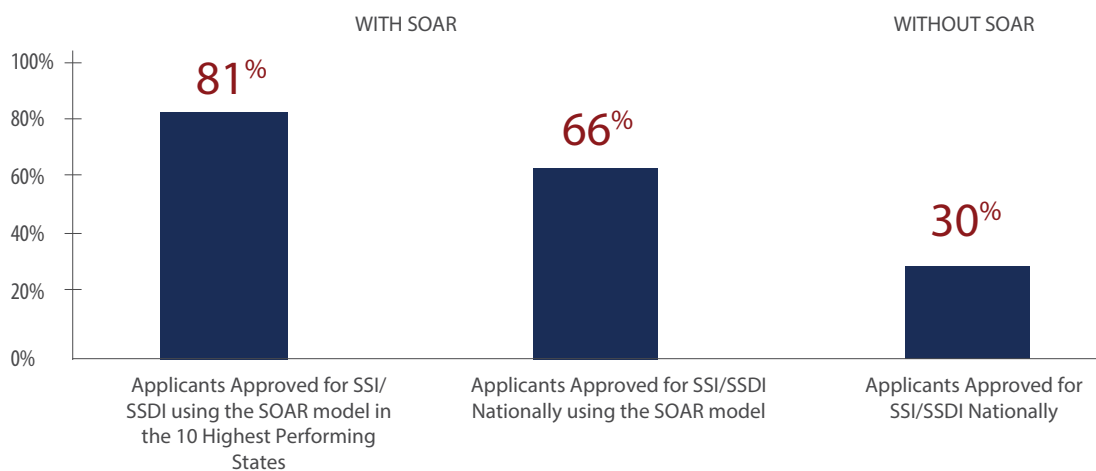
## Why SOAR?

SOAR trains caseworkers in how to complete SSI/SSDI applications on behalf of eligible Veterans and other individuals—and dramatically increases their chances of success. SOAR providers manage the application process, request and collect medical records (cutting out weeks of waiting), write the Medical Summary Report and gather everything into a single packet for submission to SSA and the Disability Determination Services (DDS).

SOAR works. Applicants experiencing homelessness who do not have assistance have a 30 percent approval rate on initial application. Using the SOAR model, the application success rate skyrockets to 66 percent nationally. In the 10 highest performing states, the success rate is a stunning 81 percent, according to SAMHSA data.<sup>1</sup>

SOAR helps caseworkers get SSI/SSDI applications right the first time—speeding approval times and reducing denials or the need for appeals. Successful Veteran SSI/SSDI applicants receive critical benefits to use for housing and living expenses and exit homelessness. **It also provides caseworkers with 20 hours of free continuing education credits (CEUs). Training to earn the CEUs can be completed online at caseworkers' convenience.**

## SOAR Works



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<sup>1</sup> 2023 SOAR Outcomes. The SAMHSA SOAR TA Center. November 2023. <https://soarworks.samhsa.gov/article/2023-national-soar-outcomes>

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## *Five Reasons VA Caseworkers Should Take SOAR Training*

1. Help end homelessness among Veterans and prevent at-risk Veterans from becoming homeless.
  2. Contribute to helping thousands of Veterans access the benefits they've earned.
  3. Learn how to complete high-quality SSI/SSDI applications, a skill you can use throughout your work on behalf of individuals with disabilities.
  4. Advance your career by learning a new skill that improves VA services on behalf of Veterans.
  5. Earn 20 hours of continuing education credits (CEUs) from the National Association of Social Workers (NASW).
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## *Complete the SOAR Online Course*

Help more Veterans get their SSI/SSDI applications right the first time by training to become a SOAR provider. The free SOAR Online Course not only equips you to serve more Veterans, it also earns you 20 CEUs to apply to your professional development.

Training takes just 20 hours, and can be completed at your own pace, preferably within 30 days so you retain the information. The SOAR Online Course features the following components:


- Seven classes with articles, short quizzes and a practice case to test your knowledge of SOAR techniques on a fictitious applicant
- Video interviews, medical records and progress notes that show you the information you need to complete SSI/SSDI forms and write the applicant's Medical Summary Report
- The opportunity to submit your completed fictitious application to the SAMHSA SOAR Technical Assistance (TA) Center for review

When your training is complete and your "application" is approved, you'll receive a certificate of completion and the 20 credits.

**Learn about SOAR training and enroll at <https://soarworks.samhsa.gov/course/soar-online-course-adult-curriculum>.**

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## The SOAR Process: Steps to Success

- Step 1**  Complete the SOAR Online Course to learn the SOAR process.
- Step 2**  Determine Veterans' eligibility for SSI/SSDI and SOAR assistance.
- Step 3**  Assist the Veteran in creating a "My Social Security" account at <https://www.ssa.gov/myaccount/> to collect information about any pending SSI/SSDI applications and to determine how many work credits the Veteran has collected towards SSDI eligibility.
- Step 4**  Begin gathering supporting documentation (e.g., collect records/releases, send letters requesting information).
- Step 5**  Expedite collection of medical evidence and other information using VA records systems and other sources:
  - Joint Legacy Viewer (JLV)\*
  - Homeless Operations Management and Evaluation System (HOMES)
  - Computerized Patient Record System (CPRS)
  - Public Housing Authority (HUD-VASH) applications
  - Psychosocial assessments
  - Compensated Work Therapy (CWT) records
  - Veterans and their families or designated representatives
  - Community partners, such as SSVF providers or local clinics, who may provide services for the Veteran.
- Step 6**  Complete and save SSA forms (SSA-1696, SSA-8000, SSA-16, SSA-3368, SSA-827).
- Step 7**  Write the Medical Summary Report (MSR) and send the MSR to the Veteran's treatment provider for review and a co-signature
- Step 8**  Submit the complete SSI/SSDI Application packet:
  - Call SSA for an appointment.
  - Complete the online Disability Benefit Application at [www.SSA.gov](http://www.SSA.gov) 24–48 hours before the SSA appointment.
  - Hand-deliver or transmit (if this is an option) the full packet (SSA forms, Medical Summary Report, medical records).
- Step 9**  Stay in touch with the Veteran, SSA, and DDS.
- Step 10**  Receive a decision and notify the Veteran. If successful, payment generally begins within 30 days.

*\*The JLV web application provides the ability to view specific clinical data within Veterans' longitudinal health records stored in electronic medical record systems available to the Veterans Administration (VA), Veterans Benefits Administration (VBA), and the Department of Defense (DoD). This may help establish onset dates and locate specific types of records. JLV has a feature to build reports of combined records (i.e., medication records across sites, hospitalization, etc.), saving time for the SOAR practitioner.*

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# The SOAR Process: Social Security Administration (SSA) Forms Guide

What forms do you need to complete SSI/SSDI applications? This checklist will help you make sure you have everything you need to submit applications on behalf of Veterans.

## SSA-827: Authorization to Disclose Information to SSA

- Applicant's name, date of birth, Social Security number
- An address where the applicant can receive mail (*for applicants experiencing homelessness, this may be the case manager's VA Medical Center address*)

## SSA-1696: Appointment of Representative

- VA staff can serve as an applicant's appointed representative to help aid in communication with SSA and DDS. *\*Most SOAR-trained representatives are non-attorneys and all waive the right to a fee.*

## SSA-16: Application for Social Security Disability Insurance (SSDI)

- The date of onset for disability (*recommend using the applicant's last day of work*)
- Information about prior marriages and all children under 18, or over 18 and disabled
- Any other benefits the applicant may be applying for, such as Veterans' benefits, Supplemental Security Income (SSI), cash assistance or workers' compensation

## SSA-8000: Application for Supplemental Security Income (SSI)

- The applicant's parents' names, to help with identification
- The mailing and residential address (if different) for the applicant, and details about their current living arrangement (*if the applicant is in an institution, SSA will need a release date in order to process the application*)
- Details about the applicant's income and resources
- Information about the receipt of food stamps or the need to apply for food stamps
- Details about prior military or other federal service, and related applications for benefits

## SSA-3368: Adult Disability Report

- All physical or mental conditions (including emotional or learning problems) that may limit the applicant's ability to work
- Last grade completed in school and an estimated year of completion, as well as details about any specialized job training, including military training
- Details from all the jobs (up to 5) that the applicant had in the 15 years before he or she became unable to work, including job title, type of business, dates worked and approximate hours/rate of pay (if known). (Note: Include military service in this section for Veterans; military employment earns SSA work credits)
- All medicines the applicant is taking, including prescriptions and any over-the-counter medicines (*include recent prescriptions that the applicant may not be consistently taking*)
- Details from all medical sources that have examined or treated the applicant for physical or mental conditions, even if they are not recent. Include substance use treatment and jail/prison

# The SOAR Tip Sheet: Guide to Completing SSI/SSDI Applications

SOAR-trained VA caseworkers can use this tip sheet to complete SOAR-assisted SSI/SSDI applications on behalf of Veterans. The table shows application steps and provides tips in red to guide VA caseworkers to information in VA's systems to help efficiently complete applications.

## SSI/SSDI Application Steps

### I. Establishing a Protective Filing Date

1. Was SSA contacted to establish a protective filing date by a method below?

Called SSA       Online (by beginning Online Disability Application at [www.SSA.gov](http://www.SSA.gov))      DATE:

2. Does the SOAR representative have proof of protective filing in applicant's records?     Yes     No

**TIP:** Collect this information from Social Security Administration (SSA).

### II. SSI/SSDI Applications: Non-Medical Information

#### A. SSI Application (SSA-8000)

1. Was the SSA-8000 completed:     By SOAR representative?     By SSA representative (in person or by phone)?    DATE:

2. Was the following documentation for the SSI application provided, if needed?

(a) Marital Status     Yes     No     N/A

**TIP 1:** Find this information in HOMES assessment, on the Computerized Patient Record System (CPRS) cover sheet or in the psychosocial assessment (check for accuracy). Recent data are found in "recent notes" area.

**TIP 2:** Find the most recent information in the place where the assessment was last updated, either in CPRS or HOMES. (All VAMCs have different note titles so use information from where the most recent activity is stated.)

(b) Immigration Status     Yes     No     N/A

**TIP 1:** Permanent residents could have served in the military, but HOMES does not ask this question.

**TIP 2:** Check DD-214 for the U.S. citizen check box. If it's unchecked, it may indicate that the Veteran is a naturalized citizen or has a Green Card.

(c) Living Arrangements     Yes     No     N/A

**TIP 1:** This question asks Veterans' housing status, where they live (e.g., on the street or in a shelter), and who, if anyone, the Veteran lives with. Find the information in HOMES or the psychosocial assessment. Be as clear as possible when describing living arrangements and use the comments section if necessary.



(d) Assets/Resources  Yes  No  N/A

(e) Income  Yes  No  N/A

**TIP:** HOMES asks about income but doesn't necessarily ask about assets. Check for this information in a public housing authority (PHA)/HUD-VASH application, if applicable.

**TIP:** HOMES may not contain income/bank information. Check for this information in a public housing authority (PHA)/HUD-VASH application, if a Veteran has completed one.

### B. SSDI Application (SSA-16)

1. Was the SSA-16 completed and submitted:

Online  In Person  By Phone DATE:

**TIP:** Check the HOMES assessment for information about Veterans' children because this question appears on this form.

2. Did the Date of Onset match the date reported on the SSA-3368?  Yes  No

### C. Appointment of Representative (SSA-1696)

1. Was the SSA-1696 signed and submitted?  Yes  No DATE:

**TIP:** VA staff can sign this form and serve as an applicant's appointed representative to help aid in communication with SSA and DDS. Most SOAR-trained representatives are non-attorneys and all waive the right to a fee on this form.

## III. SSI/SSDI Applications: Medical Information

### D. Adult Disability Report (SSA-3368)

1. Was the SSA-3368 completed and submitted:

Online  In Person  By Phone DATE:

2. On the SSA-3368, was the following information provided:

(a) Additional contact person besides appointed representative?  Yes  No

**TIP:** List a family member or another person who knows about the Veteran's health condition or another contact as preferred by the Veteran. Check the CPRS cover sheet or JVL for emergency contacts and next of kin information.

(b) ALL physical and mental health conditions?  Yes  No

**TIP:** Check the CPRS "Problems" tab for physical and mental health conditions (e.g., when and who diagnosed), the psychosocial assessment (i.e., history and physical), and HOMES.

(c) Last grade completed, and details about special education or specialized training?  Yes  No

**TIP:** Check these sources for information: DD-214, for training information; HOMES, for last grade of completion; Compensated Work Therapy (CWT), for information on education and training; and the psychosocial assessment.

(d) Employment details about the five most recent jobs in the past 15 years with best estimates of tasks, duration, pay and dates worked?  Yes  No

**TIP:** Check the CWT or work with the Veteran to check their my Social Security account.

**NOTE:** Veterans can set up a my Social Security account to more easily manage their benefits. Learn more at [www.ssa.gov/myaccount](http://www.ssa.gov/myaccount).

(e) Comprehensive listing of treatment providers (addresses, phone numbers and dates, where possible) for ALL past and current physical and mental health treatment, including:

(a) Reasons for treatment and treatment provided?  Yes  No

(b) Medications currently taking or prescribed, what they are for and ALL side effects?  Yes  No

(c) All recent medical tests with approximate dates and location?  Yes  No

**TIP:** Check the CPRS Veteran information cover sheet to find diagnoses and primary care assignments.

**NOTE:** Use CPRS to produce a "Meds Tab" (prescription list), all diagnostics performed/ordered and medical and physical histories. It is highly recommended that SOAR providers use the "Problems List" tab to gather information.

3. Are ALL questions answered completely, with any clarifications included in remarks?  Yes  No

4. Was information about the applicant's last date worked consistent across all forms?  Yes  No

## IV. Medical Records

### E. Authorization to Disclose Information (SSA-827)

**TIP:** When no medical records are submitted, DDS will request records from treatment sources listed in the application; however, SOAR providers can help collect records, often gathering them more quickly. Additionally, having the records helps the caseworker understand what they contain, what is missing, and what is needed to support the application with the Medical Summary Report.

1. Was a signed and dated SSA-827 submitted to SSA, either in person or online?  Yes  No
2. Were medical records provided via Electronic Records Express (ERE) or faxed with a bar-coded cover sheet provided by DDS?  Yes  No

## V. Medical Summary Report (MSR)

### A. Introduction

**Section TIP:** Avoid information regarding the applicant's race, sexual orientation, or religion unless these demographics are related to traumatic experiences and/or discriminatory practices that impact their physical and/or mental health and contributes to the severity of their symptoms and current ability to function. (\*Note: SSA does not collect information regarding those demographics.)

Does this section cover:

1. The applicant's physical description, including their behavior, mannerisms and dress?  Yes  No
- 2: All of the applicant's mental and physical health diagnoses?  Yes  No
3. Information/observations that illustrate the applicant's symptoms and functioning?  Yes  No

### B. Personal History

**Section TIP:** Check CPRS for occupational therapy or work therapy assessments. Please do not forget to obtain this information directly from Veterans and/or their family members.

Does this section cover:

1. Brief overview of personal history as it relates to the applicant's conditions and functioning? If trauma history is included, does it currently impact the applicant's conditions and functioning?  Yes  No
2. Educational history, including information on learning difficulties, grades repeated, special education, relationships with other students and teachers?  Yes  No
3. Employment history for past 15 years, including all jobs, reasons for leaving, job skills, problems with task completion and relationships with supervisors and co-workers?  Yes  No
4. Legal history as it relates to symptoms of their illness, with information about treatment in jail/prison?  Yes  No
5. Problems in current or past personal/intimate relationships, including problems with children?  Yes  No

### C. Treatment History

**Section TIP:** If Veteran has applied for or is getting VA disability benefits, look for the Compensation and Pension exam in the record. There may be an extensive report that documents health conditions and functional impairments, which is applicable to the MSR, if it's for the same or a similar condition.

Does this section cover:

1. Substance use history and treatment, including reasons for use, impact of use, treatment history and any periods of non-use with a focus on the applicant's symptoms while not using drugs or alcohol?  Yes  No
2. Physical health: Brief history of symptoms and treatment, with a focus on physical health in the previous two to three years? If no treatment now, why? Information on how the conditions impact the applicant's ability to sit/stand/walk/carry objects?  Yes  No
3. Mental health: Brief history of symptoms and treatment at all providers, with a focus on mental health in the previous two to three years? Is there a current mental status exam? If no current treatment, why? Is context for treatment included, rather than a list of treatment dates?  Yes  No

### D. Functional Information

**Section TIP:** If the claim involves cognitive impairment, explore the possibility of obtaining VA neuropsychological examination, This can also help to determine capacity to manage funds and if a representative payee is recommended.

Does this section cover:

1. Description of all four areas of mental functioning: understand, remember, or apply information; interact with others; concentrate, persist, or maintain pace; and adapt or manage oneself.  Yes  No
2. Are functional impairments directly linked with symptoms of the applicant's mental or physical health conditions using detailed examples and quotes?  Yes  No

### E. Summary

1. Does the report contain a brief summary of the evidence presented in the Medical Summary Report?  Yes  No
2. Is report co-signed by a physician/psychiatrist, psychologist, nurse practitioner, or physician's assistant?  Yes  No
3. Are contact names and phone numbers included for the SOAR representative and the co-signing medical provider?  Yes  No

## Submitting the Application Packet and Tracking Outcomes

Date complete application packet delivered to SSA:

Date medical records and MSR submitted to DDS:

Date SSI/SSDI decision received:

Outcome of application:  Approval  Denial

Was information added to the SOAR Online Application Tracking (OAT) System?  Yes  No

After you submit the SSI/SSDI application packet, remember to stay in touch with the Veteran and with your SSA/DDS representatives to make sure they have the information they need. Once you learn the result of the application, notify the Veteran and assist with follow up.

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## *More About SOAR: Resources*

### **SOAR Key Contacts**

Find your SOAR TA Center Liaison at <https://soarworks.samhsa.gov/contact>  
or email the SAMHSA SOAR TA Center at [soar@prainc.com](mailto:soar@prainc.com).  
SOAR State Directory: <https://soarworks.samhsa.gov/state-directory>

### **SOAR Website**

<https://soarworks.samhsa.gov/>

### **SOAR Online Course**

<https://soarworks.samhsa.gov/online-courses>

### **Identifying SOAR Applicants**

<https://soarworks.samhsa.gov/article/identifying-soar-applicants>

### **SOAR Tools and Worksheets**

<https://soarworks.samhsa.gov/article/soar-tools-and-worksheets>

### **Setting Up a my Social Security Account**

[www.ssa.gov/myaccount](http://www.ssa.gov/myaccount)

**VA and SOAR: Combining Forces to Put An End to Veteran Homelessness**  
[www.blogs.va.gov/VAntage/18414/combining-forces-to-put-an-end-to-veteran-homelessness](http://www.blogs.va.gov/VAntage/18414/combining-forces-to-put-an-end-to-veteran-homelessness)

### **VA Ending Veteran Homelessness Initiative**

[www.va.gov/homeless](http://www.va.gov/homeless)