

Identifying SOAR Applicants

This tool is intended to help case managers identify adults who are experiencing or at risk of homelessness who may be eligible for Social Security Administration (SSA) disability benefits. While we do not want to discourage anyone from applying for SSA benefits, this tool should help you identify individuals that most need your assistance with their application.

SOAR is designed to serve individuals who are able to apply for disability benefits as an adult under SSA rules. This includes persons 18 years of age or older as well as individuals who are within one month (180 days for youth who are aging out of the foster care system) of their 18th birthday. Individuals age 65 or over with low income and resources may be eligible for SSI based on age or be eligible for retirement benefits based on their work history (individuals aged 62-67, depending on year of birth, may be eligible for early retirement benefits).

Key Eligibility Criteria: *The following 4 characteristics represent key eligibility criteria for SSA disability benefits*

- Applicant has a serious mental illness or exhibits symptoms and/or has serious physical illnesses that affect his/her ability to work at a substantial gainful level (\$1,260/month in 2020)
- The illness(es) or condition(s) have lasted or are expected to last for at least 12 months (or result in death)
- Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevents sustainable employment. For example:
 - Psychotic Symptoms (positive or negative)
 - Depressive Symptoms (decreased energy, lack of motivation, suicide attempts)
 - Manic Symptoms (racing thoughts, disorganized thoughts)
 - Anxious feelings (paranoia, nervousness)
 - Cognitive deficits (brain injury, problems with concentration, memory, etc.)
 - History of trauma (history of abuse, posttraumatic stress disorder, etc.)
 - Other: _____
- For applicants with mental illness, he/she has marked restrictions in at least 2 of these functional areas, or extreme limitations in one area:
 - Understand, remember, or apply information (memory, following instructions, solving problems, etc.)
 - Interact with others (getting along with others, anger, avoidance, etc.)
 - Concentrate, persist, or maintain pace (as they relate to the ability to complete tasks)
 - Adapt or manage oneself (hygiene, responding to change, setting realistic goals, etc.)

SOAR Recommends: *The following characteristics are not essential, but may strengthen an application*

- Applicant is prescribed psychiatric medications and continues to experience symptoms and functional impairments
- Applicant has obtainable medical evidence (for at least part of the past 12 months) that corroborates mental illness and medical complaints. If there is limited medical evidence or large gaps in treatment:
 - Applicant clearly exhibits symptoms severe enough that a one-time examination by a physician would demonstrate issues
 - Representative can write a Medical Summary Report that details symptoms and functional impairments that demonstrates diagnosed disability
- Applicant is not working due to medical and/or psychiatric conditions (i.e. not because he/she cannot find work or was laid off)
 - History of failed work attempts (started and stopped employment due to diagnosed conditions)
 - Long work history, but can no longer work up to SGA (\$1,220/month in 2019) due to conditions
 - Scattered work history due to conditions and other factors