



TO: **CCoA Legislative Advocacy Committee**

FROM: **CCoA Staff**

SUBJECT: **SOAR Program Legislative Concept**

Background

Individuals experiencing homelessness are often eligible for programs such as SSI and SSDI but, but the application process presents significant barriers to access. Caseworkers working in homelessness intervention, behavioral health, and physical health often have the closest, most consistent interaction with clients experiencing homelessness.

The SSI/SSDI Outreach, Access, and Recovery (SOAR) model serves as a guide for caseworkers to help their clients complete and submit applications for SSI/SSDI to increase the likelihood of approval of benefits. The model has key components to create an expedited, efficient application process for their clients:

1. Serve as the applicant's representative

The caseworker helps the client fill out the SSA-1696 form which authorizes the caseworker to receive all copies of notices mailed to the client, communicate directly with SSA and the Disability Determination Services (DDS) agency (in California this is CDSS), and obtain any records from the applicant's SSA application file.

2. Collect and submit medical records

CDSS requires medical records to determine eligibility for SSI/SSDI. Treatment providers often take a long time or may not respond directly to CDSS. Caseworkers are able to obtain medical records faster by coordinating between the applicant and their provider to give CDSS the requested records.

3. Write and submit a Medical Summary Report (MSR)

An MSR is a signature tool of SOAR. It is a written summary completed by the caseworker to provide a narrative of the applicant's story, circumstances, and functional needs. It serves as evidence as to the need for the applicant to receive SSI/SSDI benefits.

4. Obtains a co-signature on the MSR by an Acceptable Medical Source (AMS)

The co-signature on the MSR by a medical professional provides further validation to CDSS of the applicant's eligibility for services. Caseworkers often work with medical professionals and can get signatures easier than the client can on their own.

5. Completes quality review of application prior to submission

The caseworker ensures that the application is complete so that there is no need for follow-up or requests for additional information. This increases the likelihood of approval and ensures a quick turnaround for benefits.

Federal Funding of SOAR Training and Technical Assistance

The Substance Abuse and Mental Health Services Administration (SAMHSA) funded the SOAR Technical Assistance Center which provided training for caseworkers to understand and implement the SOAR process. The center provided resources, an online training course, and a tracking system for caseworkers to monitor the status of their clients' SSI/SSDI applications.

The Trump administration discontinued the funding for the SOAR TA Center which led its closure in August 2025. While caseworkers still use the SOAR model, there are no resources available to train new caseworkers or provide technical support beyond the few resources that have been saved before the TA Center closed.

Some states, such as Nebraska, have continued to operate a state-run SOAR program that includes a training program for new caseworkers. In addition, state leads act as liaisons for the program – providing technical assistance and guidance to local caseworkers.

The Bill

CDSS shall establish the California SOAR program that includes the following:

1. Online Training Course for certification in SOAR
2. Funding for SOAR Leads to provide in-person training and technical assistance to local governments and homelessness organizations
3. Online resources for continued support in administering the SOAR model

Additional Considerations

Other Benefit Programs to Include

SOAR has acted as a model for caseworkers to get their clients SSI/SSDI benefits. We can explore the possibility of expanding SOAR to include other programs such as Medi-Cal, CalFresh, CalWORKS, IHSS, and others. Eligibility and application processes for each program will need to be fully explored to ensure that integration with the current SOAR model can be achieved.

Costs

The establishment of a state SOAR program will have significant costs associated with it. However, investments in the program could save the state money by ensuring eligible individuals receive benefits that would otherwise lead them to more costly institutional settings. Additionally, the return of federal funding for SOAR (should federal administrations change) would mean that California has already set up an infrastructure to fully utilize federal grant money.