

# Welcome!

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## Stepping Stones to Recovery

A Training Curriculum for Case Managers Assisting Adults  
Who Are Homeless with Social Security Disability  
and Supplemental Security Income Applications



# The Challenge

- Path to recovery is extraordinarily challenging when basic needs are unmet
- SSI/SSDI application and disability determination process can seem complex
- Disconnect between the experience of homelessness and the disability application process

# A Different Approach

- SSI/SSDI – a tool in recovery
- Meeting basic needs – income, housing, and other services
- Case managers – agents of hope
- Values – choice and respect
- Active role in SSI/SSDI leads to more effective decisions and outcomes

# Stepping Stones to Recovery

- Offers enhanced and expedited process
- Provides SSA with comprehensive information
- Builds in step-by-step fashion
- Helps case managers create a clear picture of the person's life
- Culminates in medical summary report
- Based on practical community program experience
- **IT WORKS!**

# Stepping Stones to Recovery

## Initial decisions in Oklahoma

- Approval rates have gone from 31% to 63%!
- Processing time has dropped from 132 to 75 days!
- Consultative exams have dropped from 74% to 31%!

# SSA Disability Benefits – The Differences

2006

<b>Supplemental Security Income (SSI)</b>	<b>Social Security Disability Insurance (SSDI)</b>
Benefit for disabled, elderly, and blind individuals who have very low income	Benefit for insured individuals (or certain relatives)
Benefit amount is the Federal Benefit Rate (FBR), plus available State supplement	Benefit amount based on FICA contributions
Limits on assets/resources	No limits on assets/resources
Living arrangement may affect benefit amount and eligibility	Living arrangement has no effect on benefit amount or eligibility
Medicaid eligibility usually comes with SSI	Medicare eligibility usually comes after two years of SSDI benefits
Eligibility usually begins the 1 <sup>st</sup> of the full month following the date of application	Eligibility generally dependent on date of onset of disability
Work incentives usually apply immediately after work begins	Work incentives allow for 9-month Trial Work Period (TWP) during which full benefits are received

# Disability

Impairments must affect a person's ability to work.

“inability to engage in any substantial gainful activity (SGA)...”

## 1. Medically Determinable Physical or Mental Impairment

Illness(es) must either meet or be equivalent to the “listing” criteria used by DDS. Supporting information must be documented in medical records.

## 2. Duration

The impairment tied to the illness(es) must have lasted OR be expected to last 12 months or more OR result in death.

## 3. Functional Information

Applicant must demonstrate that significant functional impairment related to the illness(es) exists.

# Protective Filing Date - SSI

Establishing a date of first contact with  
Social Security

**Determines when individual can start  
receiving benefits**

# Date of Onset - SSDI

- Date DDS uses to determine when disability began
- Particularly important for SSDI applications as it affects both income benefits and Medicare eligibility
- Date is critical for the determination of retroactive benefits as well

# Non-Medical Information

Earnings

Personal Information

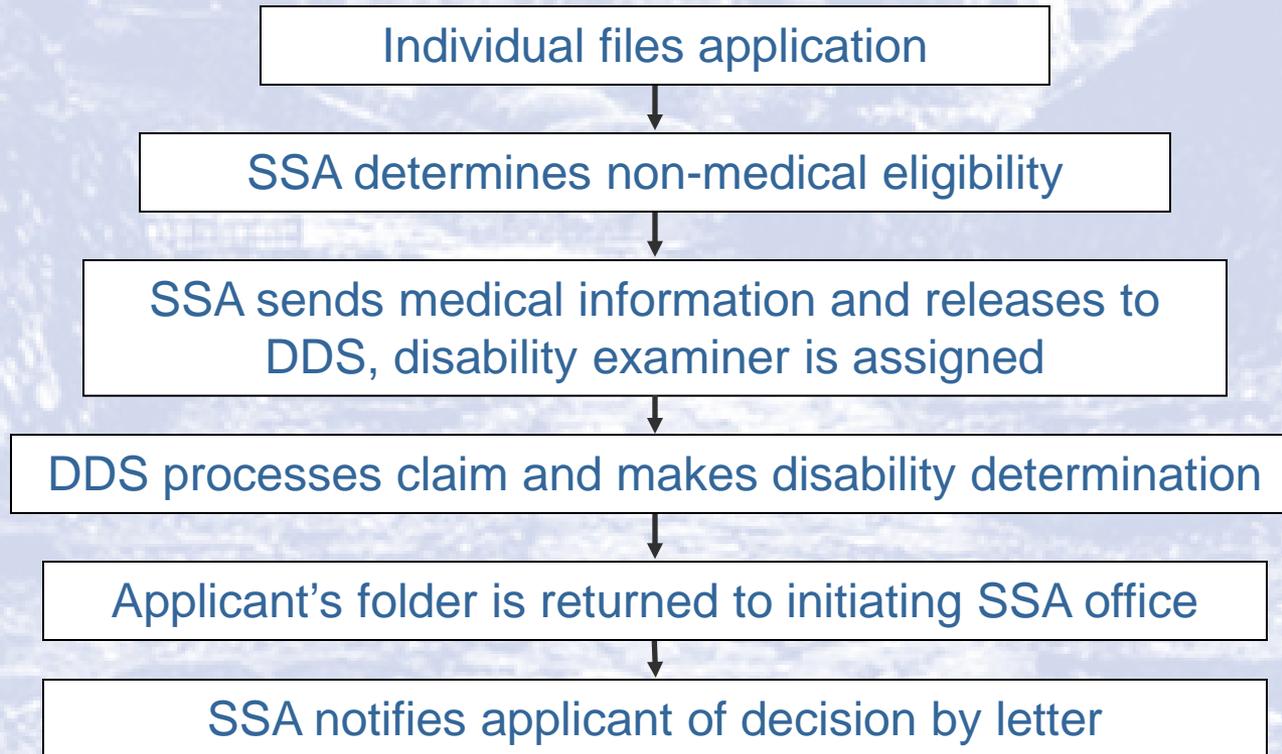
Disability Information

Immigration Status

Legal

# Medical Information

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## **SSA-3368 Disability Report**

(can be completed online)

## **SSA-3369 Work History Report**

(can be included in Medical Summary Report)

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

(one for each provider with medical information; use in conjunction with agency release form)

# Disability Report: SSA-3368

- Disability Report allows DDS to obtain a complete picture of applicant's medical history and treatment
- Completeness is critical
- Ensure that all known information is provided
- This form can be completed and submitted on-line – i3368

# Medical Evidence to Be Provided

- All treatment sources, past and present, for physical and mental illnesses
- All vocational or rehabilitation programs that the applicant attended
- Remarks that enhance any relevant information
- Work history that is comprehensive and specific
- Information on past work demands and skills
- Functional information – Modules XI – XII

# Possible Paths to Medical Evidence

Applicant  
Friends/Family Members  
Service Providers  
Commonly Used Facilities  
State Mental Health Departments  
Internet  
Yellow Pages

# Areas of Functional Information

**I**

Marked restrictions of activities of daily living

**II**

Marked difficulties in maintaining social functioning

**III**

Marked difficulties in maintaining concentration, persistence, and pace (as they relate to the ability to complete tasks)

**IV**

Repeated episodes of decompensation (each of extended duration)

Make the **link**

between the diagnosis or illness  
and the functional impairment.

# Handy Tips

- Disability reports should be completed in the first person in the applicant's own words
- Be as complete as possible – add pages if necessary
- Include information about *all* health problems
- Contact the DDS examiner within 2 – 3 weeks of application; confirm contact info and willingness to help
- Make contact with the DDS professional/medical relations officer – plan strategies for collaboration

# Further Difficulties

Inconsistent Treatment

Poor Records

Forgotten Treatment

Transient Treatment

# Potential Roles: Case Manager / Outreach Worker

## **Contact Person**

Central point of contact

Helps complete SSI or SSDI application

Helps SSA and DDS obtain information

## **Representative**

Provides same functions as “contact person” above

Has legal authorization to act on behalf of applicant

## **Representative Payee**

Responsible for assistance with budgeting and managing SSI/SSDI benefits

Usually at agency level, not individual case manager

# Getting the History

- Goal – portray an individual's history
- Focus on eliciting information, not completing application questions
- Ask yourself:
  - What information do I have?
  - Does it fit together to tell the whole story?
  - What am I missing?
- Listen to the person's story of his/her life

# Environment

- Set the person at ease
- Create a safe, comfortable environment
- Show respect – for person and privacy
- Demonstrate trustworthiness
- Check with person about their comfort talking in a particular place
- Respect discomfort talking about certain issues – don't label as resistant or unmotivated
- Reassure that not providing info will not restrict service

# Language

- Avoid questions on assessment forms that lead to yes / no answers
- Use sensitivity – “physical abuse” or “substance abuse”
- Avoid jargon
- Ask open-ended questions

# Process

- Not a one-time meeting
- An ongoing process
- Continual attention to the person and information offered – verbally and nonverbally – makes assessment richer and more accurate
- Strengths and struggles of the person

# *Care*-acteristics That Develop Trust

**Compassion**

**Assurance**

**Respect**

**Empathy**

# Summary

- When you apply, be sure to apply for both SSI and SSDI
- Be Patient while waiting on the determination, your application could take a few months to review.
- Questions?

# Contact Information

Tammie Vail, BA-CM-BHRS  
Community Support Specialist

ODMHSAS

1200 NE 13<sup>th</sup> Street

OKC, OK 73152

405-522-0082

[tvail@odmhsas.org](mailto:tvail@odmhsas.org)