

Learning Objectives by Module

<p>Opening</p> <ul style="list-style-type: none">• Discuss the approach of the curriculum and provide a brief description of its contents• Engage in a positive interactive process with the group• Discuss the approach of this curriculum and its major components• Discuss key components and strategies for developing a SOAR initiative in one's community
<p>Module I</p> <ul style="list-style-type: none">• Identify the two disability programs available through the Social Security Administration, SSI and SSDI• Describe the similarities and differences between the two programs• List the benefits available under each program• List and briefly describe the health insurance programs affiliated with each benefit program
<p>Module II</p> <ul style="list-style-type: none">• Focus on the struggles of people who are homeless; experience empathy• Describe the potential roles a case manager may assume when assisting a person with SSI/SSDI applications• List and describe at least three strategies for engaging individuals who are homeless and who have a serious and persistent mental illness, including allowing the person some choice and control over what happens• Describe the importance of creating a comfortable, safe and respectful environment• Discuss the interviewing techniques that can assist with gathering information
<p>Module III</p> <ul style="list-style-type: none">• Describe the process by which an application is reviewed for approval• Explain the importance of addressing non-medical criteria fully and its impact on the application process• Describe how to start the application process• Define the term "protective filing date" and explain its importance• Discuss the advantages and disadvantages of applying in person, on-line, or by phone• Discuss the advantages of accompanying the person to the interview• List the critical areas for SSI that affect eligibility and/or amount of benefits including: immigration, living arrangement, income/resources, and involvement with the criminal justice system• List the critical areas for SSDI including earnings history and the date that significant work ended• Demonstrate familiarity with the <i>SSA-8000 SSI Application</i> form and the <i>SSA-16 SSDI Application</i> form• Explain the significance of becoming an applicant's representative and the process for doing so (completing the <i>SSA-1696 Appointment of Representative</i> form)
<p>Module IV</p> <ul style="list-style-type: none">• Describe the function of the Disability Determination Services (DDS)• Explain how to locate DDS in one's own State• Describe how to use the <i>SSA-3368 Disability Report</i> form• Explain how to find and complete the <i>SSA-3368 PRO</i> on-line• List the kinds of information that should be included on the <i>SSA-3368</i> form, that is, the medical evidence required for an effective, efficient disability determination• Explain the importance of the date of onset for SSDI applications and how a complete medical picture can affect determination of this date• Describe the <i>SSA-827 Authorization to Disclose Information to the Social Security Administration (SSA)</i> and its use in collecting medical evidence
<p>Module V</p> <ul style="list-style-type: none">• List the disability criteria as defined by SSA (with the aid of notes)• Describe the five steps of sequential evaluation used by SSA and DDS for making a disability determination• Discuss how disabilities based on mental illness(es) must address how the illness impairs a person's ability to function• Describe the significance of steps 3 and 5 of the sequential evaluation• Explain how the <i>Dictionary of Occupational Titles</i> is used in disability determination• Explain what can lead to a denial of benefits• Explain how a person can be approved before all five steps of sequential evaluation are completed
<p>Module VI</p> <ul style="list-style-type: none">• List the categories of mental disorders used by DDS• Describe the purpose of the "Blue Book" or "listing" used by DDS• Describe how using information about medication and services can help to develop medical evidence

<p>Module VII</p> <ul style="list-style-type: none"> • Describe the history of substance use classification for disability purposes by the SSA • Discuss the current SSA policy regarding substance use disorders and the 1996 legal changes governing SSA's consideration of substance use • Demonstrate an understanding of the concept of "material" in disability determination through an exercise • Describe the steps to determine whether substance use is material to a person's disability
<p>Module VIII</p> <ul style="list-style-type: none"> • Describe the process of gathering medical evidence that DDS generally follows • List at least four concerns that arise when serving adults who are homeless and who have a serious and persistent mental illness • Discuss the benefits and potential drawbacks of consultative examinations, as well as what information can be found in a consultative examination report
<p>Module IX</p> <ul style="list-style-type: none"> • Discuss and compare the usual process of gathering medical evidence that DDS generally follows and an improved strategy based on proactive steps a case manager can take • List and discuss several ways a case manager can assist with the medical evidence collection process to ensure the most accurate determination is made on initial application • Explain how using SSA's electronic process can result in more rapid and accurate DDS decisions
<p>Module X</p> <ul style="list-style-type: none"> • Describe assessment as an ongoing process of observation and discovery in an atmosphere of trust • Discuss a variety of ways to establish a comfortable environment • Demonstrate the ability to use language that is respectful, non-threatening and sensitive • Demonstrate the use of open-ended questions that can be used in assessment • Discuss how to use the provided <i>Applicant Assessment Worksheet</i>
<p>Module XI</p> <ul style="list-style-type: none"> • State the key question of DDS, "Does this illness (impairment) keep the applicant from being able to engage in substantial gainful activity?" • Define substantial gainful activity • List the areas of functional information that SSA and DDS review • Discuss the context of functional information in the disability determination process • Discuss the problem of missing information from existing records and describe some ways to supplement it • Demonstrate an ability to ask comprehensive questions to elicit this much needed information • Demonstrate an ability to use language that is respectful, non-threatening and sensitive and to ask open-ended questions
<p>Module XII</p> <ul style="list-style-type: none"> • Describe how observations of functional information translate into descriptions of impairment related to a person's illness • Discuss the importance of communicating clearly to DDS a person's impairments related to the illness • Demonstrate how to write descriptions of impairment and functional response descriptions
<p>Module XIII</p> <ul style="list-style-type: none"> • List the components of a Medical Summary Report • Discuss how to use existing information in the report • Discuss the need for the co-signature of a physician or psychologist who has seen the individual, regardless of the report's author • Describe alternative uses for this report with the applicant's permission
<p>Module XIV</p> <ul style="list-style-type: none"> • Describe the supplemental programs of Medicaid that assist Medicare beneficiaries • List the income limits for each category of supplemental Medicaid programs • Identify the tools to find additional information on supplemental Medicaid programs
<p>Module XV</p> <ul style="list-style-type: none"> • Discuss how to allay some of the fears that SSI and SSDI recipients have regarding the return to (or beginning of) paid employment and the information necessary to allay these fears • Explain the different terms used in the world of work incentives under SSI and SSDI • Describe the work incentives available under SSI and SSDI • Discuss what happens to Medicaid and Medicare when individuals are employed
<p>Closing</p> <ul style="list-style-type: none"> • Create a plan to apply knowledge and skills learned in the program • Express their level of satisfaction with the program through completion of a feedback form