



Position Title: SOAR Benefit Specialist

Reports to: Program Director

FLSA Category: Exempt

Overview of Organization & Position

Since 1937, Triangle Family Services (TFS) has served as the place to turn for innovation and solutions for families facing crisis. TFS accomplishes its mission of, “Building a Stronger Community by Strengthening the Family”, through its three core program areas including, Family Safety, Financial Stability and Mental Health. Serving more than 2,000 families annually, with a 90% success rate, and 71% of our client base living below the federal poverty level. Families experiencing crisis seek TFS’ trained, accredited, and credentialed staff that provide critical financial, mental health and abuse intervention services. As TFS’ experts delve deeper into each family’s case, it is often found that there is a need to provide them with a comprehensive suite of services, which enables our community to thrive and prosper. Visit www.tfsnc.org for more information.

Position Summary

SOAR will provide support and resources through SSI/SSDI Outreach, Access, and Recovery (SOAR) process to help people successfully obtain SSI/SSDI. SOAR will work with the referral sources and community partners to accurately identify candidates through team meetings, outreaches, and referrals. This position will also be responsible for gathering any collateral or other relevant information (i.e. medical record) from SOAR provider’s agency and other providers.

Job Responsibilities

- Complete SOAR training within 30 days from date of hire
- Completes the SOAR process accurately: Utilize SOAR checklist to review the list of documentation that must be submitted (etc., SSA-8000, SSA-827s, SSA-1696, SSA-3369, SSA4814, i3368), Review all the records for any missing information or the need for further explanation to accurately complete the SOAR process, submit entire application packet to SSA within 60 days of protective filing date
- Process 25 to 40 applications per fiscal year (average minimum of 2 per month)
- Keep track of data by utilizing the online SOAR tracking system
- Responsible for scheduling client interviews and appointments for follow up in community/home/office as appropriate
- Referral Process-coordinate with street outreach teams to identify appropriate SOAR candidates having the potential applicant complete a “SOAR Project Consent for Release of Information”
- Get protective filing date paperwork submitted by filing representative form within 2 days of interview of client
- Complete interviews with client to gather information needed to complete SOAR process
- Coordinate/accompany clients to appointments in relation to SOAR process
- Write medical summary report for client’s application
- Works closely with all parties (i.e. staff, clients, SSA) to maintain communication/contact.
- Provide Outreach including street outreach to assess identify individuals for SOAR eligibility.
- Also provide ongoing training to other agencies in the community to enhance and assist their SOAR understanding and knowledge
- Participate in staff organizational meetings, both clinical and administrative.



- Maintains knowledge of current information of SSI/SSDI and SOAR

Experience, Skills and Education

- Bachelor's Degree in psychology, social work or human service field preferred.
- Experience working with adults experiencing mental health, substance use, and or trauma preferred
- Experience with the SOAR model
- Excellent oral and written communication skills.
- Proficiency in Microsoft Office Suite software (Word, Excel, Outlook, PowerPoint, etc.)
- Proficiency utilizing electronic health record systems, or client data/management information systems.
- Experience with Homeless Management Information System (HMIS) a plus
- Ability to read, analyze, and interpret documents
- Excellent organizational skills and attention to detail; ability to prioritize multiple tasks and meet frequent deadlines

Working Hours/Conditions

Full-time 40 hours per week Monday through Friday. Must be able to sit or stand for varied periods of time throughout the workday. Some travel for off-site meetings, events or tasks may be required. Work schedule may involve occasional evening and weekend hours.

TFS provides equal employment opportunities to all applicants and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state, or local laws

TFS requires all employees to be fully vaccinated against COVID-19, where allowed by state or local law unless approved accommodation is applicable.