

# Onboarding Guide for New SOAR Case Workers

## SETTING UP FOR SUCCESS

Welcome to SOAR, and congratulations on your decision to embark on a truly rewarding and fulfilling professional endeavor! When you begin providing SOAR assistance you can expect to be challenged and awed by the human experience and the resiliency of the people you serve. You will witness the transformative experience of people discovering hope through access to treatment and resources. The Substance Abuse and Mental Health Services Administration (SAMHSA) SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance (TA) Center created this Onboarding Guide to support you as you get acquainted with your new role. We recommend reviewing each resource in the order it is presented in this guide.

## Learning About SOAR

These resources will increase your knowledge about implementing the SOAR model and guide you through the training requirements.

### Onboarding Timeline

1. Read the [SOAR Overview](#) and [Getting Involved with SOAR](#) (1 hour)
2. Complete the [SOAR Online Course](#) (20 hours)
3. Attend a SOAR Online Course Review Session (3 hours)
4. Participate in a SOARing to Success Cohort (If applicable) (6 weeks)

## SOAR Registration and Enrollment

The SOAR Online Course trains case workers to assist individuals who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder to apply for the Social Security Administration's (SSA) disability programs, Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI).

- [Create an account](#) on the SOARWorks website.
- Enroll in the Adult or Child Curriculum.

## Setting Up for Success

Beginning with the appropriate supplies and file structures will help you stay organized. We recommend obtaining as many of these key outreach supplies as your program allows.

### Supplies

- Laptop (or computer with internet access)
- Folders (Classification folders with section organizers are ideal)
- Blue pens (SSA prefers signatures in blue ink to ensure they are "original" and not copies)
- Clipboard (for signing forms during outreach)
- A locking file cabinet to store sensitive information

## Digital Files

First, create a template folder that includes subfolders for *SOAR Worksheets*, *SSA forms*, *Clinical Records*, *Correspondence*, and the *Medical Summary Report (MSR)*. Copy and paste the “Template Folder” into your file system each time a new referral is received. Rename the folder with the applicant’s name.

### Folder Contents

- *SOAR Worksheets*: Intake form, SOAR interview notes (e.g., progress notes)
- *Clinical Records*: Scanned and downloaded medical records
- *Correspondence*: Emails, letters, and notices pertaining to the application
- *MSR*: Save a blank MSR template in this folder and fill it in as you gather evidence

## Paper Files

Assemble several blank paper files up front, so you can grab and go once a new applicant is assigned to your caseload.

### Folder Contents

- *SOAR Worksheets*: Referral form, Intake form, SOAR interview notes
- *SSA Forms*: SSA-827, SSA-1696, SSA 16, SSA-8000, SSA-3368
- If applicable, SSA-3373 (Function Report), SSA-3369 (Work History), SSA- 821 (Work Activity Report)
- *Clinical Records*: Releases of information for each treatment provider and collateral source, Medical Records Tracking Sheet, paper medical records
- *Correspondence*: Paper copies of correspondence from SSA and DDS

## SOAR in Your Community

Connect with the primary contacts for SOAR in your state and community. Review the [SOAR State Directory](#) to identify your primary contacts. Call or email each contact to introduce yourself.

- The **SAMHSA SOAR TA Center Liaison** provides technical assistance for all levels of SOAR work. Introduce yourself, ask if there is a specific workflow for SOAR in your state, and request contact information for key SOAR partners.
- The **SOAR State Team Lead** oversees the SOAR initiative in your state. Introduce yourself and ask if there are any state-specific training requirements for SOAR certification in your state. Ask if there is a SOAR Local Lead in your area.
- The **SOAR Local Lead** provides support and oversight of SOAR in local communities. Introduce yourself and ask about any local SOAR steering committees, inquire about contact information and application submission preferences for local SSA and DDS SOAR contacts.
- The **Social Security Administration (SSA) SOAR Contact** or Homeless Coordinator processes or serves as the liaison for all SOAR claims at the local SSA Field Office. Introduce yourself and ask if they have any preferences for SOAR-assisted SSI/SSDI application submission.
- The **Disability Determination Services (DDS) SOAR Contact** is designated to examine SOAR-assisted claims or provide connection to other DDS examiners. Introduce yourself and ask if they have any preferences for communication or submission of evidence.

## Utilizing the SOAR Model

### SOAR Workflow

The [Standard SOAR Process](#) walks you through the entire SSI/SSDI application process. Your state or locality may already have an established workflow, so be sure to check with state leadership before following the standard process.

### SOAR Tools and Worksheets

The [SOAR Tools and Worksheets](#) page on the SOAR website has many resources that will help support your applications, including:

- **Identifying SOAR Applicants:** These resources will assist with collecting referrals, reducing barriers to service, and understanding definitions of homelessness.
- **Gathering Information:** This section provides information on understanding the importance of each SSA form, along with resources and worksheets to help collect information about the applicant.
- **Medical Summary Report Tools:** The MSR is the cornerstone of a successful SOAR-assisted SSI/SSDI application. Use the resources in this section to guide you through the writing process.

### SSA Forms

The following [SSA Forms](#) should be completed with the applicant.

- SSA-3288 Consent to Release Information
- SSA-827 Authorization to Disclose Information to SSA
- SSA-1696 Appointment of Representative
- SSA-16 Application for Social Security Disability Insurance (SSDI) (*Use as a template*)
- SSA-8000 Application for Supplemental Security Income (SSI)
- SSA-3368 Adult Disability Report (*Use as a template*)
- SSA-3373 Adult Function Report (*as applicable*)
- SSA-3369 Work History Report (*as applicable*)

### Gathering Medical Evidence

Collecting medical evidence is essential to supporting SOAR-assisted disability applications. The [Frequent Records Department Contacts Spreadsheet](#) is a great resource for tracking contact information and preferences for processing releases of information for providers you will be working with.

- Some communities already have a list of commonly used medical providers, ask your SAMHSA SOAR TA Center Liaison or SOAR Local Lead if a resource exists in your community.

## Beyond the Basics

### Establishing a Referral Process

- Use the [Identifying SOAR Applicants](#) tool and the [Sample SOAR Referral Form](#) to help referral sources identify appropriate referrals for your program.
- Review the [SOAR Eligibility Decision Tree](#) when deciding whether a referral is acceptable or appropriate.

## Marketing Your Program

Once you finish SOAR training and have your workflow and referral processes set up, you will be ready to start marketing your program within your agency and throughout the community with the [SOAR Marketing Template](#).

## Tracking Outcomes

Tracking outcomes is essential to the ongoing success of SOAR. Track the outcomes of your SOAR-assisted SSI/SSDI applications in the [SOAR Online Application Tracking \(OAT\) system](#). OAT is a free, web-based program that is easy to use, and HIPAA-compliant. Review an [OAT Orientation Recording](#) for a live walk-through.