SOAR COMPLIANCE NEW Sept 2021

1. SOAR The SOAR processor or supervisor shall attend the regularly convened local planning / steering committee meetings to explore and identify funding
and sustainability as well as develop a collaborative effort to implement the SOAR model and discuss any technical assistance needs. (LSF Contract)

2. SOAR Ensure SOAR training is completed using the SOAR Online Course and refresher trainings using the SOAR Online Course once every four (4) years for all SOAR staff. SOAR trainings for specifically identified case managers and agency leads using the SOAR Online Course, are available at: https://soarworks.samhsa.gov/content/soar-online-course-catalog. A training on how to complete applications for children can also be completed at the following website. (LSF Contract)

3. SOAR Report data and outcomes to the RSTL and SOAR Technical Assistance Center using the Online Application Tracking (OAT) system, available at:
https://soartrack.samhsa.gov/login.php?msg=10, including, but not limited to:
a. Number of SOAR-assisted SSI/SSDI applications.
b. Decisions on applications, including appeals; and
c. Numbers of days until applications are approved from date of application submission to date of decision. (LSF Contract)

4. SOAR SOAR Processors are required maintain a process for individual medical records for each SOAR participant. Each record would contain an intake form, a determination of eligibility for SOAR services, a SOAR service plan, and progress notes per 65E.4 guidelines as case management services will be the primary billing mechanism. If the SOAR program is part of a larger milieu of services, the consumer is participating in at a community provider the SOAR material must be integrated into that record. (LSF Contract)

5. SOAR If the network service provider offers adult mental health general revenue case management services under the LSFHS contract, the provider shall employ one full-time employee to be utilized as a dedicated SOAR processor whose sole duty is to process SOAR applications for AMH clients. (LSF Contract)

6. SOAR Each dedicated SOAR processor is required to assist with at least four (4) SSI/SSDI applications per quarter each year. (LSF Contract)

7. SOAR Each dedicated SOAR processor will complete all SSI/SSDI paperwork necessary for applications within 60 days of the protective filing date, defined as the time when an applicant first contacts the Social Security Administration indicating an intent to file for SSI/SSDI. This paperwork is to be copied and filed in the consumer chart. (LSF Contract)

8. SOAR If applicable, each dedicated SOAR processor will complete the appeal process for those applications which may be denied upon initial review. (LSF Contract)

9. SOAR Each SOAR processor will develop a best practice screening process to determine the best consumers to begin applications on behalf of. SOAR best practice tools can be located at: https://soarworks.samhsa.gov/content/library-home (LSF Contract)

10. SOAR Each SOAR application 'completed' must have a Medical Summary Report. (LSF Contract)

11. SOAR The dedicated SOAR processor will maintain a minimum approval rating of 60% of submitted applications on the initial submission during each calendar year. (LSF Contract)

12. SOAR Policy/Procedure (LSF Contract) Does the processor have documentation of SOAR training or refresher training in the last 4 years in their personnel file?

13. SOAR Policy/Procedure (LSF Contract) Does the supervisor of the dedicated SOAR Processor generate ongoing reports to monitor the progress of the processor?

14. SOAR Policy/Procedure (LSF Contract) Is the dedicated SOAR Processor documented with LSFHS, along with complete contact information?