

SOAR Supervision Checklist

A CHECKLIST FOR SUPERVISING SOAR CASE WORKERS

SOAR (SSI/SSDI Outreach, Access, and Recovery) case workers assist eligible 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 Social Security Disability benefits. Due to the unique nature of the position, the following are helpful suggestions and reminders when supervising SOAR case workers.

Onboarding

- Use the [Onboarding Guide](#) for training and orientation to the role.
- Connect the SOAR case worker to key contacts for communication and support:
 - Social Security Administration (SSA)
 - Disability Determination Services (DDS)
 - SAMHSA SOAR TA Center Liaison
 - SOAR State Team Lead and Local Leads (as applicable)

Logistics

- Arrange for private office space.
- Provide a laptop computer and access to a fax machine or scanner.
- Provide a locking filing cabinet.
 - Offer guidance on records retention policies
- Offer access to transportation.
- Establish procedures for medical records requests and invoices:
 - Include a Medical Records Request Letter with state laws cited.
 - Provide clear guidance on agency policies related to medical records invoices.

Time Management

- Allow time for training and supplemental learning.
- Reserve time for outreach and collaboration building with community partners and SSA/DDS.
- Set reasonable application expectations:
 - 25/year for new full-time dedicated SOAR case workers
 - 35/year for experienced full-time dedicated SOAR case workers
 - 1 per month for part-time SOAR case workers

Support

- Hold weekly or bi-weekly case consultations and supervision.
- Become familiar with the SOAR model.
- Provide regular contact with other case workers doing similar work.

- Establish relationships with partner agencies:
 - Mental health providers for assessments and MSR co-signatures
 - Birth certificate and Identification procurement
 - Representative payee providers
 - Legal aid organizations for appeals (as applicable)

Monitoring for Quality

- Review data entered into the SOAR Online Application Tracking (OAT) system.
- Provide feedback on Medical Summary Reports (MSRs).
- Examine participant files to ensure fidelity to the model and accuracy in reporting.

Succession Planning

- Use the [Succession Planning Checklist](#) as a guide.
- Know where to find case files and the status of active and pending cases.
- Have copies of key SSA, DDS, and medical provider contacts that the case worker communicates with.