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Maximizing Online Application Tracking (OAT) Utilization for SOAR Outcome Tracking

Presented by the Substance Abuse and Mental Health Services Administration (SAMHSA)
SOAR Technical Assistance (TA) Center
U.S. Department of Health and Human Services

June 6, 2019



Disclaimer

The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).



Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Questions and Answers

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Purpose and Objectives

- Learn how to access and utilize the SAMHSA SOAR Online Application Tracking (OAT) system
- Understand why it's important to track your SOAR-assisted SSI/SSDI application decisions
- Learn how to run reports to highlight SOAR success and promote quality

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Agenda

Presenters

- Kristin Lupfer, Project Director, SAMHSA SOAR TA Center, Policy Research Associates, Inc., Delmar, New York
- Amanda Starkey, Project Associate, SAMHSA SOAR TA Center, Policy Research Associates, Inc., Delmar, New York
- Michelle Woolf, Outreach Specialist and SOAR State Team Lead, Michigan Department of Health and Human Services, Lansing, Michigan
- Barbara Moody-Holbrook, Housing Specialist and SOAR Local Lead, Southeast Florida Behavioral Health Network, Jupiter, Florida

Questions and Answers

- Facilitated by the SAMHSA SOAR TA Center


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Welcome!

Mark P. Jacobson, Ph. D.
Office of Program Analysis and Coordination
Center for Mental Health Services
Substance Abuse and Mental Health Services
Administration

June 6, 2019



Overview of the SOAR Online Application Tracking (OAT) System

Kristin Lupfer, MSW
Project Director
SAMHSA SOAR Technical Assistance Center
Policy Research Associates, Inc.


June 6, 2019



Why Track SOAR Outcomes?

- Assess effectiveness
- Provide quality improvement
- Celebrate successes
- Secure future funding opportunities

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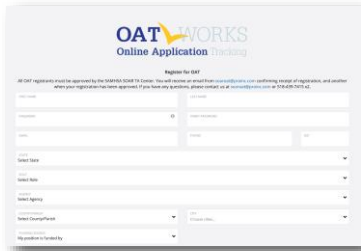
Online Application Tracking (OAT)

- A web-based program that allows case managers to keep track of their outcomes
 - Free
 - Easy to use
 - Accessible from any web browser
 - Nothing to download
 - On a secure server
 - HIPAA compliant
 - No personal identifying information is collected
- <https://soartrack.prainc.com>



OAT Registration

Track outcomes and get funding!



Roles in OAT

- State Team Lead
 - Directs the SOAR initiative at the state level; has access to data from all agencies in the state.
- Local Lead
 - Oversees multiple agencies in a community, county or region; has access to data from multiple agencies in the specified service area.
- Agency Lead
 - Oversees multiple case workers in an agency; has access to data from all caseworkers in that agency.
- Caseworker
 - Works with applicants and enters data into OAT on his/her application outcomes. Has access to his/her data only.



Using OAT as a Management Tool

- Run reports as a state, local, or agency lead to look at:
 - Approval rates
 - Use of SOAR Critical Components
 - Number of applications from each case manager
- Use outcomes to identify opportunities for targeted TA



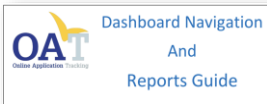
Use Outcomes to Monitor Quality

- Look for low approval rates
- Look for whether SOAR critical components were used
- Identify areas for improvement
- Target communities, providers or individual case managers for additional training or technical assistance
- Share outcomes regularly with communities
- Reward communities, providers and individual case managers who demonstrate high quality and consistent outcomes



Resources and Guides


- SOAR OAT User Guide
- SOAR OAT Reports Guide
- Support: soaroot@prainc.com



Michigan's Transition to OAT


Michelle Woolf
 Outreach Specialist, SOAR State Team Lead
 Michigan Department of Health and Human Services
 Lansing, Michigan

June 6, 2019




Introduction

- Michigan's SOAR Initiative launched in 2006.
- Michigan Department of Health and Human Services (MDHHS) Housing and Homeless Services Division provides statewide leadership.
- Currently, Michigan has 132 SOAR practitioners from 69 different agencies.



SOAR Data Collection

- Michigan began using OAT on July 1, 2018.
- Prior to this, SOAR applications were entered in the Michigan State Homeless Management Information System (MSHMIS or HMIS).



Overarching Question?

Why Switch?

SAMHSA

Why Switch?

- Access
 - Michigan’s HMIS requires user licenses that have an annual fee.
 - Users must complete time-intensive training annually.
 - Not all SOAR practitioners work at an agency that uses HMIS regularly or at all.

SAMHSA

Why Switch?

- Maintenance
 - Michigan’s HMIS houses dozens of programs. The system’s design and priorities are determined by HUD.
 - Not always able to make changes or address technical issues for SOAR.

SAMHSA

Why Switch?

- **Functionality**
 - No mechanism to assist end users with tracking applications or prompt them to enter application decisions.
 - Only 1 report available. Not aligned with SOAR annual report fields.



Transition Process

- Communication to SOAR practitioners.
- Shared OAT link and user manual.
- Available to answer questions and troubleshoot issues.
- SAMHSA SOAR TA Center support was key!
 - Michigan Liaison hosted OAT tutorial webinar for SOAR practitioners.



Today

- OAT messaging begins at training.
- All SOAR practitioners are registered and enter applications in OAT.
- Reports
 - *Summary*: Run at least monthly to monitor Michigan outcomes.
 - *User Summary*: Run at least monthly to monitor SOAR practitioner activity.
 - Regional SOAR Navigators use this as a tool to target outreach/TA; verify that newly trained practitioners are registered.
 - Shared with state SSA and DDS SOAR contacts so they are aware of where SOAR activity is.
 - *Individual*: Run as needed to monitor SOAR activity for a specific practitioner or agency. Regional SOAR Navigators use this as a tool to target outreach/TA.



User Summary Report

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Growth of OAT Utilization in Florida

Barbara Moody-Holbrook
Housing Specialist, SOAR Local Lead
Southeast Florida Behavioral Health Network
Jupiter, Florida

June 6, 2019

Introduction

- The standardized SOAR Process has been in place since 2007 with periodic revisions as needed.
- OAT data conversations bring stronger collaborations and buy-in.
- Great relationships with SSA SOAR Liaisons; Palm Beach County and The Treasure Coast.
- SSA SOAR Liaison maintains a spreadsheet of all SOAR-assisted SSI/SSDI applications submitted to our SSA Liaisons.
- SSA SOAR Liaison attends workgroup.
- Strengthening those relationships is key!

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Reviewing OAT and SSA Data Together!

SSA SOAR Liaison Benefits:

- Cross reference data
- Confirm applications are completely to SOAR fidelity
- Weekly conversations
- Our "go to" with status questions
- Consistent communication is key in the SOAR Process
- Single point of contact at SSA field offices
- Feedback on submitted applications

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Introducing OAT to the SOAR Community

- Striving towards better OAT outcomes is crucial
- Utilizing the OAT tools created by the SAMHSA SOAR TA Center, e.g.) OAT User and Report Guides
- Encouraging ongoing conversations about the data and what we can do better
- Training on OAT is critical to proper and consistent usage

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Tracking Success with OAT!

- With one SOAR Dedicated Benefits Specialist:
 - OAT data went from 0 applications within one agency to 68 applications submitted in 1.5 years
 - Initial: 44 approvals/24 denials
 - Reconsideration: 12 approvals/7 denials
 - ALJ Hearing: 1 approval
 - 72 days to decision (initial applications)

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Using OAT as a Management Tool

- It all begins with quality applications!
- Obtaining all decision letters prior to inputting final data into OAT ensures accuracy
- Reviewing reports allow Supervisors and CEOs to see the need for SOAR
- Tracking Medicaid reimbursements shows a return on investment

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Applications Page

Initial SOAR Applications

Show 10 1 entries Search Export CSV

AppID	PID Date	App Date	Decision Date	Status	Case Worker	Agency	State	Actions
ab600a7234	10/01/2018	11/01/2018	12/03/2018	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab600a7234	11/09/2016	12/01/2016	12/28/2016	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab600a7234	02/15/2014	04/15/2014	06/15/2014	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab600a7235	06/13/2014	07/15/2014	08/15/2014	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab74ea1235	06/13/2014	10/01/2014	10/15/2014	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab74ea1235	10/02/2018	10/23/2018	10/25/2018	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab800a7235	11/15/2018	01/01/2019	03/15/2019	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab800a7235	02/01/2017	03/01/2017	04/03/2017	APPROVED	Smith, Sarah	Agency One	YY	Actions
ab800a7235	12/19/2016	01/20/2017	02/09/2017	APPROVED	Smith, Sarah	Agency One	YY	Actions
ac33aa3333	10/01/2018	11/01/2018	12/03/2018	APPROVED	Kilpatrick, Mike	Agency One	YY	Actions

Showing 11 of 255 entries

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Applicant Overview

Applicant Overview

0070N42345
Created 07/27/2018
Approved on July 27, 2018

Approved For: [Name]
Priority: [Value]
Why applicant located at location?
Representative Paper Needed?
Shows to Complete Guide?
Protective Hearing Date: 07/27/2018
Application Date: 07/27/2018
For Support 100-1000? Yes
Medical Records Collected? Yes
MIB: Yes
MIB Co-Signed? Yes

Applicant Created: 07/27/2018 10:00 AM
Initial SOAR Application-Details: 07/27/2018 10:00 AM
Initial SOAR Application-Decision: 07/27/2018 10:00 AM
Initial SOAR Application-Print Approval: 07/27/2018 10:00 AM

Case Worker: Sarah Smith
Agency: [Name]

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Using OAT as a Management Tool

- Providing Technical Assistance for each person once they are trained for at least 1-2 applications
- Holding ongoing phone conversations or face to face visits to develop and strengthen relationships
- Establishing collaborations with medical records departments
- Reinforcing the correct use of OAT
- Leading Work Groups to discuss OAT data

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OAT Discussed in SOAR Work Group

- Monthly group meeting
 - Networking
 - Frustrations
 - Case discussion
 - Resolution
- SSA SOAR Liaison attends as available
- State Team Lead and Florida's SAMHSA SOAR TA Center Liaison have an open invite to join
- Discussions on data entry
- Using data for positions
- Using data for funding incidentals; transportation, medical visits, etc.
- Site Visit Contract Validation

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Benefits of OAT Reports

- Opportunity for program growth
- Funding
- Homelessness discussions
- Acknowledgement and recognition of the work you do
- Community change
- Collaboration
- Transparency
- Awareness of immigration issues
- More questions to ask

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What OAT Data Showed Us

- Previous years of implementing SOAR was a community challenge
- Providing OAT data brought positive community change and buy-in
- Agencies now recognize the need for SOAR as a result of SOAR outcomes being easily displayed in OAT reports

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5 Reasons To Enroll in OAT Today!

1. OAT is user friendly!
2. OAT is free!
3. If you ever have questions, contact your SOAR State Team Lead, Local Lead or SAMHSA SOAR TA Center Liaison
4. OAT reports at the local level are key for your SOAR State Team Lead when submitting annual outcomes to SAMHSA
5. Accurate OAT input drives sustainability, so don't hesitate to ask for help

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The Benefits of OAT to Your SOAR Community


- It is through understanding and striving to develop and maintain SOAR community buy in
- OAT is crucial component to prove the hard work we put in does work!
- Hang in there... OAT does work!!

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Questions and Answers

Please type your questions into the Q&A box on the right of your screen

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Next Steps

- ✓ Get in touch with your SAMHSA SOAR TA Center liaison
- ✓ Register for OAT
- ✓ Track your SOAR-assisted SSI/SSDI applications!

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Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

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1-877-SAMHSA-7 (1-877-726-4727) • 1-800-487-4889 (TDD)

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