



Learning Community Call #4

Tracking Outcomes and Evaluation Criteria

PRESENTED BY:

SAMHSA SOAR TECHNICAL ASSISTANCE CENTER
POLICY RESEARCH ASSOCIATES, INC.

UNDER CONTRACT TO:

SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES



Welcome Back!

Kristin Lupfer, Project Director
SAMHSA SOAR TA Center





Agenda

- Homework Review
- Today's Topic: Tracking Outcomes and Evaluation Criteria
- Group Discussion
- Homework Assignment
- Wrap-Up and Adjourn



Logistics

- Downloading materials
- Chat questions
- Group Discussions
- Q&A





Homework Report Out

Assignment:

- Present information about your assessment and referral tool for SOAR and IPS, along with your process for developing the tool (or implementing the tool if it is already in use)

Report Out:

- State spokesperson will present findings (3 minutes maximum) to the group



(Arizona) IPS/SOAR Assessment & Referral

- **Pre-screen assessment created by Maricopa County local SOAR leads**
 - Pre-screen is “mini MSR” capturing functional and biopsychosocial information
 - Performed with potential SOAR clients referred by agencies, case managers, etc.
 - Clients not eligible for SOAR program referred to benefits specialists, case managers, legal services, or navigators
- **Using the SOAR pre-screen assessment for IPS referrals**
 - SOAR pre-screen assessment already captures IPS employment assessment data
 - Added sections: strengths, computer/job skills, future goals
 - Email potential referrals to IPS Specialist with attached SOAR assessment for IPS Specialist to determine available options or staff potential client with SOAR Specialist

Colorado SOAR/IPS Integration

- CABHI Screening Tool updated to include IPS Supported Employment
- IPS Career Profile updated to include SOAR Practitioner
- CABHI Referral Form includes both SOAR and IPS



DBS

Colorado Disability Benefits Support Program (DBS)

Solving the Puzzle!

Connecticut

ILLINOIS CABHI-STATES-ENHANCEMENT

New Referral/Screening tool created

- ▶ IPS referral documents
- ▶ SOAR Applicant Checklist
- ▶ Dartmouth Tool guideline
- ▶ Added questions about SUDs and treatment in the table with mental and physical disability questions
- ▶ Added into the barriers question under Part D examples of barriers to discuss that include SUDs, physical & mental disabilities, and legal history.
- ▶ Discussion took place around flow of document and sections were switched around. Employment Section moved to the beginning of document.
- ▶ Language was changed from third person (he/she/they) to second person (you) – person centered.
- ▶ Referenced Employment Assessment and Planning Tool and the Identifying SOAR Applicants Tool

ILLINOIS CABHI-STATES-ENHANCEMENT

Discussion during process:

- ▶ Need to come up with a way to track referrals and ensure team approach to working with a consumer.
- ▶ Ensuring adhere to IPS fidelity in planning the integration process
- ▶ Increased communication and collaborations/partnerships between systems (if someone obtained employment during the application process that was over SGA and what needs to happen.)
- ▶ SOAR is mainly done in-house at agencies – generally not someone's full time job responsibilities (excludes federally funded positions)
- ▶ Talked about the soft-hand off with referrals (follow up)
- ▶ Barriers for those with justice involvement and costs associated with securing records.

Review Checklist/Entrance Form

- Initiated at first visit
- Client completes entrance form
 - Job/Career interests
 - Most recent employment
 - Potential barriers identified by client
- Check list provides:
 - Guide to material needs for job search
 - Computer assessment needs
 - Benefits, health insurance, SNAP
 - Covers all enrollment activities

Massachusetts CABHI-IPS

Job Profile Form

- Completed during first meeting with Employment Counselor
- Identify desired position
- Obtain information about requirements (O*Net, posting)
- Identify client's matching skills, knowledge, education
- In cases where skills and requirements do not match, develop a plan to address

Massachusetts CABHI-IPS



CABHI SOAR/IPS - Michigan



SOAR/IPS Assessment Tool

- SOAR Specialist can assesses client's interest using assessment tool and make recommendation to clinical case managers
- Assessment tool typically an ongoing conversation with client – not necessarily done in one sitting

SOAR/IPS Referral Process

MI CABHI does not currently have referral process between SOAR and IPS – referrals come from clinical case managers

Soar Specialists assess client's interest in employment and work with case managers to submit referral form to CABHI Program Supervisor


CABHI Program Supervisor:

- Reviews referral form and submits to SES Program Supervisor


Continued collaboration and communication between SOAR Specialists, Case Management staff, and SES staff, as needed.

Mississippi

Nevada



Ohio



Tennessee Initial Assessment

- Each of the 5 CABHI sites in our state conducts a different initial assessment with certain required elements
 - The assessment is used to identify and assist program participants to access mainstream benefits for which they are eligible, such as TennCare (Tennessee's Medicaid program), Behavioral Health Safety Net of Tennessee (BHSN of TN), Supplemental Nutrition Assistance Plan (SNAP), Supplemental Security Income / Social Security Disability Income (SSI / SSDI), Veterans Administration (VA) benefits, Support Services for Veterans Families, Veterans' Affairs Supportive Housing, and physical health care.
- To this point in time, questions regarding employment have not been required for the initial assessment
- The draft assessment provided for homework is an adaptation of one of our CABHI sites as opposed to a form that will be required for all sites

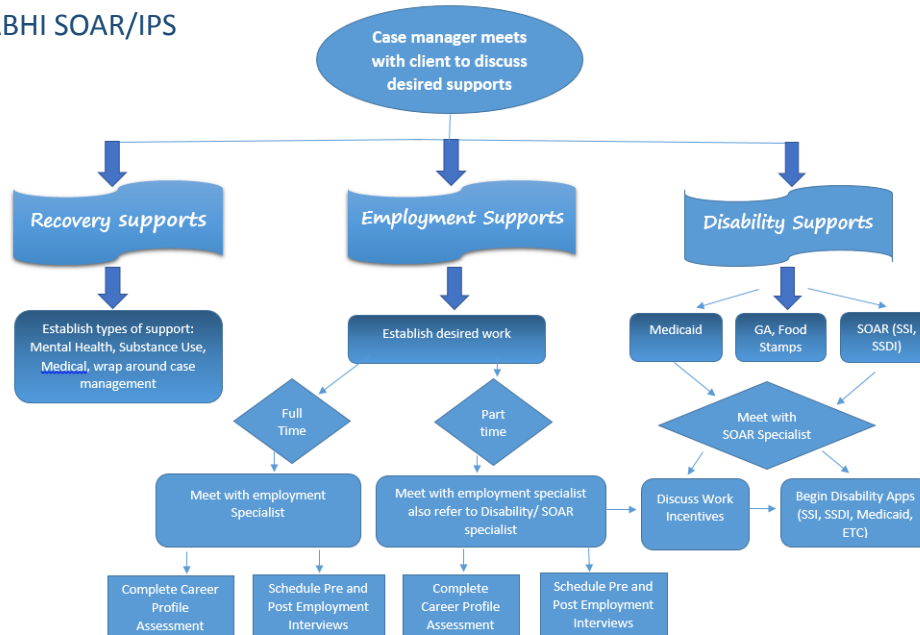
TN CABHI IPS/SOAR Process

- Team Leader and Program Coordinator triage referrals for IPS based on client need.
- Clients are introduced to the IPS program at intake into the program.
- Clients are assessed by their case manager for appropriateness for the IPS program.
- Case manager refers clients to CABHI IPS Employment Specialist during weekly treatment teams.

TN CABHI IPS/SOAR Process

- Team Leader and Program Coordinator triage referrals for clients into the CABHI SOAR program.
- Clients are introduced to the SOAR program during the intake process.
- If the client is appropriate for the SOAR program their case manager refers them to the SOAR case manager during weekly treatment teams.
- The CABHI SOAR case manager starts 3 new SOAR applications each month.

Utah: CABHI SOAR/IPS



Veteran Outreach and Recovery Program (VORP)

Support for Homeless Veterans with Behavioral Health needs

Wisconsin Department of Veteran Affairs

SSI/SSDI Outreach and Recovery (SOAR) to Individual Placement and Support (IPS)

SOAR Quick Assessment and Referral to IPS

Veterans Name: _____ Veterans Contact Phone number: () - _____
 Veterans Address: _____ Veterans Email: _____

What is the Veteran saying about work? Why does the Veteran want to work now? What type of job?

Is this Veteran interested in gaining more education now to advance their career goals?

Please include some information about the Veteran's illness (diagnosis, symptoms, etc.). How might the Veteran's illness (and/or substance use) affect a job or return to school?

What are some of the Veteran's strengths? (Experience, training, personality, supports, etc.)

What job (type of job, hours, etc.) do you think would be a good match?

On a scale of 1–10, how important is a job to the Veteran?

1 2 3 4 5 6 7 8 9 10
 Not at all important Important Extremely important

Comments:

On a scale of 1–10, how confident is the Veteran that they can be successfully employed?

1 2 3 4 5 6 7 8 9 10
 Not at all confident Confident Extremely Confident

Comments:

SOAR Practitioner: _____ Contact Information: _____



Evaluation Goals, Key Components, and Process

Jen Elder, SOAR TA Center



Evaluation Goals

Two-pronged evaluation:

- Process
 - What best practices and efficiencies can we identify through the new assessment and referral processes?
 - What systemic challenges do we need to address?
- Results
 - Measure increase in number of individuals exploring work while applying for or receiving SSI/SSDI
 - Measure increase in number of individuals receiving income from both employment and disability benefits
 - Housing stability of individuals served





Key Data to Collect

- Number of individuals assessed for income support services
 - Number utilizing SOAR-only, IPS-only, and both services
- SOAR and IPS outcomes
 - SOAR: application outcomes including approval rates and days to decision
 - IPS: number of new job starts and number in competitive employment
 - Both: amount of monthly income (for those using SOAR and employment, specify pre- or post- award of disability benefits) and housing status
- Collaborative process: frequency of meetings between SOAR and IPS staff and case collaborations, challenges in the process you are working to overcome, success stories



Data tracking process

- For the pilot, we'll be collecting data at 6 months (December 2016) and at 12 months (June 2017)
- Excel spreadsheet to compile key indicators for the pilot
- While we formally collect data at 6 and 12 months, each state will be informally reporting outcomes to the group on monthly check-in calls




Reporting Form


State: _____
 Submitted by: _____
 Date: _____

	Jun 2016	Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016	Dec 2016	Six Month Results (June-Dec)	Jan 2017	Feb 2017	Mar 2017	Apr 2017	#####	Jun 2017	Six Month Results (Jan-June)	12 month results (June-June)
General Process Questions																
What aspect(s) of the SOAR and IPS integration are going well?								(insert narrative)							(insert narrative)	(insert narrative)
What barriers have you encountered with the SOAR and IPS integration?								(insert narrative)							(insert narrative)	(insert narrative)
In what ways can the SOAR and IPS collaboration be improved?								(insert narrative)							(insert narrative)	(insert narrative)
How frequently do SOAR and IPS staff meet together?								(insert frequency)							(insert frequency)	(insert frequency)
What is the purpose of these meetings?								(insert narrative)							(insert narrative)	(insert narrative)
SOAR-Specific Questions																
How many individuals did you assess for SOAR services? (per month)									0						0	0
How many individuals enrolled in SOAR services? (per month)									0						0	0
How many complete SSI/SSDI applications have you submitted?									0						0	0
How many applications were approved for benefits?									0						0	0
For the applications that have decisions, what is the average days																


CABHI: SOAR and IPS Pilot Outcomes Form



Group Discussion



- Are there outcomes we haven't mentioned which you think the pilot should capture?
- Some of you are working with Evaluators for your program. How do you think they can help with this data collection/ assessment/reporting?
- Questions about data or collection process?





Outcome Tracking Systems for the Pilot

Kristin Lupfer, SOAR TA Center



Outcome tracking systems

Homeless Management Information System (HMIS)

- Connection to income
- Housing status of individuals served

SOAR Online Application Tracking System (OAT)

- SOAR application outcomes
- Income received from employment before/after disability application

Dartmouth Quarterly Outcomes Report

- Number of IPS intakes, individuals accessing competitive employment, and new job starts

Utilize these tracking system reports to quickly compile pilot data





Group Discussion

- How are you tracking outcomes?
- Who enters the data into the selected system? Who can run reports and compare or compile the data to match the SOAR applicants with the IPS participants? Have you thought about multi-agency releases to help with the data sharing?
- Do you foresee any potential barriers to tracking these outcomes?



Next Steps: Pilot Check-in Calls

Pam Heine, SOAR TA Center





Pilot Check-in Calls

- Monthly beginning June 30th
- At least one person from each state team should be prepared to attend the check-in call
- Format:
 - State report-out of progress made, successes, and challenges
 - Mini-topic for continuing education
 - Open Q&A to discuss challenges encountered



Questions?





Homework Assignment

Jen Elder, SOAR TA Center



Homework

- Finalize your tracking methods
- Send information about your state's tracking methods and process to Jen Elder (jelder@prainc.com) by close of business Friday, June 3
- Jen will share state information with the group by June 6th





Wrap-Up and Adjourn

- Questions or Comments?
- Next call: June 30, 2016 3:00-4:30pm EDT
- Thanks for your participation!

