Certification Criteria for SOAR Case Worker

1. Successful completion of SOAR Online Course with proof of certificate or attendance of an approved "in-person" SOAR training provided by a Kansas SOAR trainer.
   http://soarworks.prainc.com/course/ssissdi-outreach-access-and-recovery-soar-online-training

   Successful completion of the SOAR Online Course includes the submission and approval of the mock application submitted to the SOAR TA Center.

2. Submission of SOAR outcomes in SOAR OAT or the creation of a profile in SOAR OAT (for new SOAR case workers)   https://soartrack.prainc.com/

3. Utilization of SOAR Critical Components
   a. Serve as the applicant's representative through the SSA-1696
   b. Collection and submission of medical records
   c. Submission of Medical Summary Report
   d. M.D Physician or PH.D psychologist co-signature on Medical Summary Report
   e. Completion of a self-review of the application before submission, using the Quality Review Checklist for SSI/SSD Applications

4. SOAR applications are submitted following the national SOAR process including the on-line submission of the SSA-16 and SSA-3368, 24 – 48 hours prior to submitting the completed packet to SSA (**unless otherwise noted by the local SSA office**)

   A complete SOAR application includes:
   a. A completed SOAR Checklist (to be used as a cover sheet)
   b. A completed SSA-8000 (SSI application) along with any needed supportive documentation
   c. Online submission of the SSA-16 (SSDI application) and the SSA-3368 (Adult Disability Report), within 24 -48 hours of submission
   d. Submission of online medical release form (SSA-827) ; and a printed/signed copy
   e. A completed SSA-1696 (Appointment of Representative form)
   f. Medical records and collateral information
   g. A medical summary report documenting functional impairments (co-signed by M. D physician or PH.D psychologist, if possible)

5. Submission of a minimum of two complete SOAR applications to SSA every 12 months*
   *An exception may be granted if the community is building their infrastructure for SOAR

6. Annual completion of at least one of the continuing education opportunities listed below
   a. Participation in a SOAR webinar or
   b. Participation of refresher training or fundamentals training (if available) or
   c. Submission of a Medical Summary report to SOAR TA Center for quality review.