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For additional assistance, contact us at soar@prainc.com.

Establishing an Equitable SOAR Referral System

Substance Abuse and Mental Health Services Administration
(SAMHSA) SOAR Technical Assistance Center
Policy Research Associates, Inc.

May 24, 2022



SAMHSA
Substance Abuse and Mental Health
Services Administration

Disclaimer

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Webinar Instructions

- **Slides/Materials:** Available at <https://soarworks.samhsa.gov/events>
- **Recording:** Will be available within 1 week
- **Questions:** Please submit questions using the Q&A feature
- All participant lines will be muted and the chat feature is disabled
- **Evaluation:** Your browser will redirect you to a survey following the webinar.

Purpose and Objectives

- Learn best practices for creating and incorporating a SOAR referral system and workflow
- Understand how to use the tools available on the SOARWorks website to create a seamless referral system
- Recognize the importance of ensuring equitable access to SOAR services

Agenda

Presenters

- **Amanda Starkey, M.A.**, Project Associate, SAMHSA SOAR TA Center, Policy Research Associates, Delmar, New York
- **Katie Lundy, MSW, LSW**, Oncology Social Worker, SOAR Benefits Specialist, and SOAR Local Lead for Montgomery County, Pennsylvania
- **Lyla Ordoñez**, SOAR Program Administrator, SOAR Texas State Lead, AVENUE 360, Houston, Texas

Questions and Answers

- Facilitated by the SAMHSA SOAR TA Center

Welcome!

Asha Stanly, MSW, LICSW
Government Project Officer
Division of State and Community Systems Development
Center for Mental Health Services
SAMHSA SOAR TA Center

May 24, 2022



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SOAR Referral System Tools

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May 24, 2022



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Key Takeaways

- Significance of a strong referral system
- Needs Assessment for SOAR within agency and community
- Marketing strategies for recruiting SOAR-eligible applicants
- Customized referral process and tool that will facilitate SOAR collaboration in your community
- Materials available on the SOARWorks website

Benefits of a Strong SOAR Referral Process

- Referrals are easily triaged
- Eligible applicants are identified quickly
- Ineligible applicants can be referred out appropriately
- Saves time for everyone
- Ensures equitable access to SOAR services

SOAR Referrals Toolkit



- Agency and Community Assessment
- Marketing Tool Template
- Referral Process Workflow
- SOAR Referral Template
- Applicant Resource Guide
 - Applicant Self-Help Guide
- Referral Tracking Worksheet

Considerations for SOAR at Your Agency

- Assessing your agency:
 - Determine agency-specific SOAR program requirements
 - Do applicants need to meet certain criteria to receive services?
 - Identify SOAR-trained providers
 - What providers are implementing SOAR?
 - Identify SOAR referral sources
 - Are specific programs or case workers sending referrals?

Considerations for SOAR in Your Community

- Assessing your community:
 - Identify other agencies that provide SOAR assistance
 - Do their program requirements differ from yours?
 - Processing of interagency referrals
 - Is there a central referring source, like the CoC?
 - Spot the high utilizers
 - Are there agencies that make a lot of referrals?
 - Cover the gaps
 - Where can ineligible SOAR applicants be referred?

Agency and Community Assessments

- We recommend completing these assessments prior to editing your referral process tools.
- Helps determine:
 - Who is most likely to send referrals
 - Agencies and departments that need SOAR marketing information
 - Who can assist potential applicants who are not eligible for SOAR services within your agency

SOAR Agency and Community Assessment

In order to create effective SOAR marketing and referral tools, we must have strong foundational knowledge of SOAR in your agency and within the community. This assessment will help guide your intentions as you work through creating a strong referral system. If you do not know the answer to a question, research it! The information collected in this assessment will be used to create a referral system that works where you do.

Agency Assessment

- Who is providing SOAR services in your agency?
- What are the agency criteria to receive SOAR services?
- If more than one case worker in your agency is providing SOAR services, do the eligibility criteria vary between providers?
- How many in-agency referrals do you receive per month?
- Where are your referrals coming from?
- Are there any other teams or case workers who serve SOAR eligible people, but are not making SOAR referrals?
- What happens when you receive a SOAR referral from within your agency and the person does not meet program criteria?
- What strategies and efforts does your agency implement to reduce racial disparities in service delivery?

Community Assessment

- Do you accept outside referrals?
- What agencies provide SOAR services in your community?
- What agencies refer potential SOAR applicants to you?
- How do you currently receive referrals from other agencies?
- Is SOAR part of coordinated entry in your CoC?
- Are there any agencies that serve likely SOAR-eligible people who are not making referrals?
 - If yes, what agencies?
- What happens when someone is referred for SOAR services from another agency, but is not eligible for your SOAR program?
- What other programs/agencies provide SSI/SSDI assistance?
 - Legal Aid?
 - Law Schools?
 - Advocacy programs?
 - Churches?
 - Other?
- What happens if a SOAR applicant is denied for SSI/SSDI on the initial application?
- What other agencies in your community, particularly those who serve diverse populations, need to know about SOAR?

- Using the information gathered from your community/agency assessment(s):
 - Who already knows about SOAR?
 - Are these stakeholders making referrals?
 - Who needs to know about SOAR?
 - What other agencies and/or program areas serve SOAR-eligible people but aren't making referrals?

SOAR Marketing Template

- Define SOAR
- Program Eligibility
- Program Highlights!
- Referral Instructions

XYZ COMMUNITY MENTAL HEALTH

WHAT IS SOAR?	WHO IS ELIGIBLE?
SSI/SSDI Outreach, Access, and Recovery (SOAR) is a national program designed to increase access to the disability income benefit programs administered by the Social Security Administration (SSA) for eligible adults and children who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder.	Eligible referrals must be a Veteran or military spouse, have a confirmed medical impairment or mental illness that prevents gainful income, and be experiencing or at risk of homelessness.

2019

PROGRAM HIGHLIGHTS		
50 assistance to over 50 eligible adults	\$600,000 over \$600,000 in back pay and monthly benefits	42 42 families were connected with disability benefits

HOW TO MAKE A REFERRAL

SSI/SSDI Outreach, Access, and Recovery (SOAR) is a national program designed to increase access to the disability income benefit programs administered by the Social Security Administration (SSA) for eligible adults and children who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder.



Make a referral and contact SOAR | email: pra@email.com | phone: 555-555-5555 | website: www.abc.com

What Makes a Strong Referral Tool?

- A Strong SOAR Referral Tool
 - Is easy to complete
 - A referral form should not take more than five (5) minutes to complete
 - Clearly identifies who is being referred
 - Name and contact information for applicant
 - Identifies why an applicant is applying
 - Diagnoses, symptoms, and income/resources
 - Addresses program requirements and equity considerations
 - Ensures that the applicant is being referred to a service they are eligible for

Considerations for a Strong Referral Tool

- User-friendly
- Space for contact information
- Addresses program criteria
- Can be quickly screened

SOAR Referral Application
Please complete in full and fax to: [Contact Name] at [Fax #]

Candidate Name: _____ Date of referral: _____
 Referring agency: _____ Person making referral: _____
 Staff contact number: _____ Email address: _____

Candidate Identifying Information:

Date of birth: _____ Gender: _____ Pronouns: _____ Race: _____
(must be within 30 days of 18 years of age, or within 180 days if exiting foster care)

SSN: _____ Education (last grade completed): _____ Marital Status: _____

Current living arrangement (address, shelter, area of town): _____

Employment status: _____ Veteran? _____

Emergency contact name and number: _____

Part A: Homelessness/At-Risk Assessment

Where is the candidate currently living? Check the appropriate selection

Experiencing Homelessness	"X"	At-Risk for Homelessness	"X"
Outdoors	<input type="checkbox"/>	Doubled up/couch-surfing	<input type="checkbox"/>
Shelter	<input type="checkbox"/>	Received eviction notice or has substantial arrears in rent/utilities	<input type="checkbox"/>
Transitional Housing	<input type="checkbox"/>	Permanent supportive housing that is grant funded (Housing First placements)	<input type="checkbox"/>
	<input type="checkbox"/>	Exiting foster care	<input type="checkbox"/>
	<input type="checkbox"/>	Institution – hospital, nursing home, etc.	<input type="checkbox"/>
	<input type="checkbox"/>	Jail	<input type="checkbox"/>

How long has the candidate been experiencing homelessness: _____ Years and _____ Months

Is the candidate in an institution or jail? _____ Yes _____ No
 If yes, are they expected to be released within 30 days? _____ Yes _____ No
 Were they experiencing homelessness before entering the facility? _____ Yes _____ No

Has the candidate had difficulty maintaining housing? _____ Yes _____ No
 If yes, please describe: _____

Part B: Current Application for SSA Benefits or Pending Appeal

Has the candidate recently applied for Social Security benefits? _____ Yes _____ No
 If yes, date of application: _____ Decision on application: _____ Pending _____ Denied
 If denied, did the candidate appeal? _____ Yes _____ No
 If yes, are they waiting on a decision? _____ Yes _____ No
 Are they working with a lawyer? _____ Yes _____ No

SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance Center November 9, 2021

Contact Information

- Clearly defined contact information
 - Name, phone, email, and mailing address for person who will be taking the referrals
 - Instructions for submitting the referral
 - *“Please fax or email the completed SOAR referral form to John Doe with **Subject: SOAR Referral** at jdoe@xyzcmh.com or 555-555-1234.”*

Program Criteria

- Consider adding program criteria at the top of the form

“This SOAR Referral should only be completed for adults who are being released from jail within the next 90 days and have a severe mental health diagnosis.”

- Make sure program criteria is clearly defined within the referral
 - This will help save time for referring sources and potential applicants

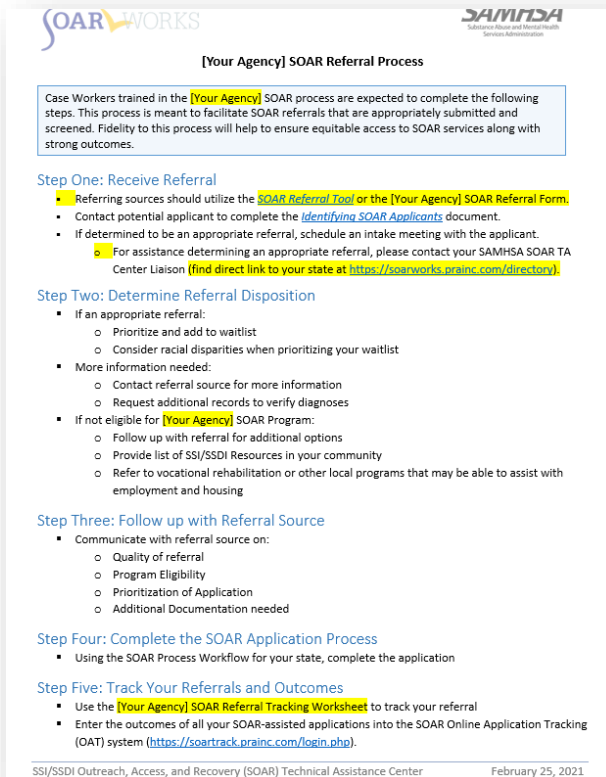
“Is this person a Veteran?”

Quick Screening

- The SOAR provider should be able to make a quick decision regarding the applicant's program eligibility
- If the potential applicant is not eligible for your program, a contingency plan should be in place
 - Outside referrals to another local SOAR agency, Legal Aid, University Legal Clinic, or a self-help guide for people applying on their own

SOAR Referral Workflow

- Clearly outlines all steps to completing, submitting, and reviewing a SOAR referral
- Guides providers through the referral process
- Used as a road-map for new providers



The screenshot shows a document titled "[Your Agency] SOAR Referral Process" from SAMHSA. It includes a header with the SOAR WORKS logo and SAMHSA logo. The main text states: "Case Workers trained in the [Your Agency] SOAR process are expected to complete the following steps. This process is meant to facilitate SOAR referrals that are appropriately submitted and screened. Fidelity to this process will help to ensure equitable access to SOAR services along with strong outcomes." The document is organized into five steps: Step One: Receive Referral, Step Two: Determine Referral Disposition, Step Three: Follow up with Referral Source, Step Four: Complete the SOAR Application Process, and Step Five: Track Your Referrals and Outcomes. Each step contains specific instructions and links to relevant tools and resources.

SOAR WORKS

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[Your Agency] SOAR Referral Process

Case Workers trained in the [Your Agency] SOAR process are expected to complete the following steps. This process is meant to facilitate SOAR referrals that are appropriately submitted and screened. Fidelity to this process will help to ensure equitable access to SOAR services along with strong outcomes.

Step One: Receive Referral

- Referring sources should utilize the [SOAR Referral Tool](#) or the [Your Agency] SOAR Referral Form.
- Contact potential applicant to complete the [Identifying SOAR Applicants](#) document.
- If determined to be an appropriate referral, schedule an intake meeting with the applicant.
 - For assistance determining an appropriate referral, please contact your SAMHSA SOAR TA Center Liaison ([find direct link to your state at https://soarworks.prainc.com/directory](#)).

Step Two: Determine Referral Disposition

- If an appropriate referral:
 - Prioritize and add to waitlist
 - Consider racial disparities when prioritizing your waitlist
- More information needed:
 - Contact referral source for more information
 - Request additional records to verify diagnoses
- If not eligible for [Your Agency] SOAR Program:
 - Follow up with referral for additional options
 - Provide list of SSI/SSDI Resources in your community
 - Refer to vocational rehabilitation or other local programs that may be able to assist with employment and housing

Step Three: Follow up with Referral Source

- Communicate with referral source on:
 - Quality of referral
 - Program Eligibility
 - Prioritization of Application
 - Additional Documentation needed

Step Four: Complete the SOAR Application Process

- Using the SOAR Process Workflow for your state, complete the application

Step Five: Track Your Referrals and Outcomes

- Use the [\[Your Agency\] SOAR Referral Tracking Worksheet](#) to track your referral
- Enter the outcomes of all your SOAR-assisted applications into the SOAR Online Application Tracking (OAT) system (<https://soartrack.prainc.com/login.php>).

SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance Center February 25, 2021

Ensure Equity

- Remove criteria that makes people ineligible because of past inequities
 - 12 months of treatment
 - Treatment records for underserved communities
- Add steps to SOAR Referral Workflow that increase equitable access to services
 - Mental Health screenings
 - Follow-up questions for people with limited treatment records

Resources for Applicants

- Information on the application process
- Other representation services
- Resources to help people ineligible for SOAR

Representative and Legal Resources

American Bar Association

- The American Bar Association can help you locate the bar association for lawyers in your state
Website: https://www.americanbar.org/groups/legal_services/flh-home/flh-bar-directories-and-lawyer-finders/

National Organization of Social Security Claimants' Representatives (NOSSCR)

- NOSSCR provides referrals to attorneys and non-attorney representatives in your local area
Lawyer Referral Service Phone: 800-431-2804
Email: nosscr@nosscr.org
Website: <https://nosscr.org/referral-service/>

National Association of Disability Representatives (NADR)

- NADR provides referrals to attorneys and non-attorney representatives in your local area
Phone: 1-800-747-6131
Website: <https://www.nadr.org/search/custom.asp?id=1689>

State or Local Legal Aid

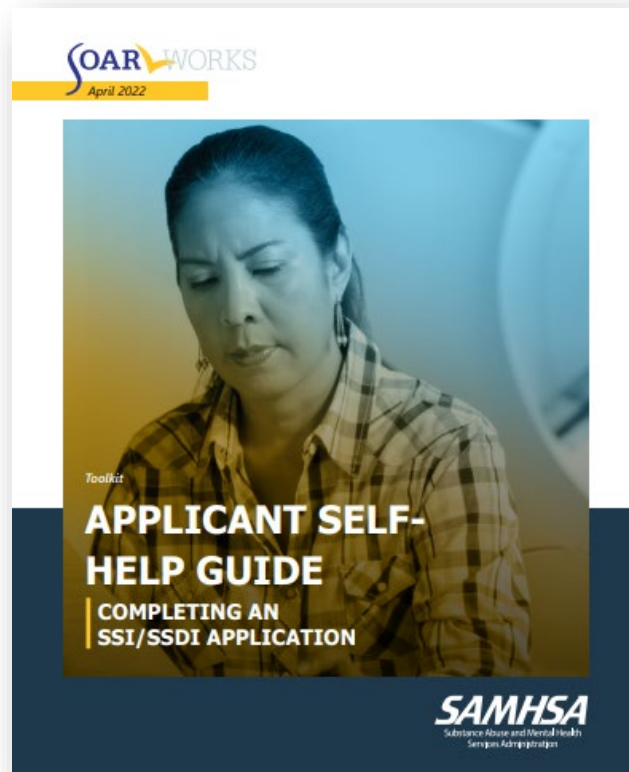
- Legal Services Corporation (LSC) provides information about LSC-funded state or local legal aid agencies
Website: <https://www.lsc.gov/what-legal-aid/find-legal-aid>
Phone: 1-202-295-1500
- LawHelp.org helps people find free legal aid programs in their communities

Law School Legal Clinics

- If there are Law Schools in your community, search to see if they offer legal clinics with supervised law students

Self-Help Guide for Applicants

- A new tool for applicants without access to SOAR services
- Can serve as a valuable tool for any community
- Increases equity related to accessing benefits



Tracking Referrals

- Triage Referrals
- Track Referral Sources
- Assign Applicant Disposition
- Outcome of Referral
- *Check out our handy pick-lists!*

Referral Source Information							
Referring Agency	Referring Caseworker Name	Referring Email	Referring Phone	Date of Referral	Date of Follow-Up	Referral Disposition	Reason for Disposition
Agency 1	Caseworker 1	test@email.com	555-444-3333	1/23/2020	1/24/2020	Not accepted	No severe impairment
Agency 1	Caseworker 1	test@email.com	555-444-3333	1/24/2020	1/25/2020	Waitlist placement	Lack of evidence/documentation
Agency 1	Caseworker 2	test@email.com	555-444-3456	1/24/2020	1/25/2020	Active placement	Meets program criteria
Agency 2	Caseworker 3	test@email.com	555-444-3423	1/25/2020	1/26/2020	Priority placement	Meets program criteria
Agency 3	Caseworker 4	test@email.com	555-444-3440	1/26/2020	1/27/2020	Priority placement	Meets program criteria
Agency 1	Caseworker 4	test@email.com	555-444-3440	2/1/2020	2/2/2020	Active placement	Meets program criteria
Agency 3	Caseworker 5	test@email.com	555-444-3443	2/4/2020	2/5/2020	Active placement	Meets program criteria
Agency 1	Caseworker 1	test@email.com	555-444-3333	2/5/2020	2/6/2020	Active placement	Meets program criteria
Agency 1	Caseworker 1	test@email.com	555-444-3333	2/10/2020	2/11/2020	Not accepted	Not at-risk of homelessness

Applicant Information							
Applicant Name	Age	Gender	Race/Ethnicity	Diagnosis/Conditions	Co-Occurring Disorders	Treatment at Time of Referral	Work Activity
John Smith	34	Male	White	Depression	Current use	No recent treatment	Current
John Doe	45	Male	White	Schizophrenia, OUD	Recent use	Recent (within last 90 days)	Past
John Jones	56	Male	Black	PTSD, Asthma	Past use	Past (within the past year)	Past
Jane Smith	23	Non-binary	White	Anxiety, Back Pain, SUD	In Treatment	Current	Current
Jane Doe	40	Female	Black	Depression, Learning Disability	None	Current	None
Jane Jones	45	Female	Latinx	Schizophrenia	Past use	Past (within the past year)	Past
Mary Smith	43	Female	Black	PTSD, TBI	Past use	Recent (within last 90 days)	None
Mary Jones	54	Female	Black	Anxiety, Lupus, SUD	Current use	No recent treatment	Current
Mary Doe	61	Female	American Indian	Schizophrenia	None	Recent (within last 90 days)	Current

Outcome of the Referral								
Quality of Referral	Date of Intake Assessment	Date SSI/SSDI App Submitted	App Not Submitted	Date of Decision	Outcome of Decision	OAT ApID	Additional Notes	
Missing information	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Referred to VR
Complete information	2/15/2020	3/15/2020	N/A	4/15/2020	Approved	er34er3456		
Required multiple follow-ups	1/26/2020	2/26/2020	N/A	3/26/2020	Denied	er34er3459		
Complete information	1/27/2020	2/27/2020	N/A	3/27/2020	Approved	er34er3457		
Complete information	1/28/2020	N/A	Incarceration	N/A	N/A	N/A	N/A	Will do pre-release app
Complete information	2/3/2020	3/3/2020	N/A	4/3/2020	Approved	er34er3445		
Required multiple follow-ups	2/6/2020	3/6/2020	N/A	4/6/2020	Approved	er34er3422		
Missing information	2/7/2020	3/7/2020	N/A	4/7/2020	Approved	er34er3222		
Complete information	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Referred to Legal Aid

Pick-lists available for certain data elements:

Analyzing Your Process

- Immediate Feedback
 - Ask referral sources about their experience using the new referral process
- Tracking Success
 - Has the new referral process resulted in measurable outcomes?
 - Is SOAR access equitable?
- Amending the Process
 - Keep an open mind, and make changes as needed

Thank You

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

Amanda Starkey

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[**www.samhsa.gov**](http://www.samhsa.gov)

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

Evolving SOAR Referral System in Montgomery, Pennsylvania

Katie Lundy, MSW, LSW
Oncology Social Worker
SOAR Benefits Specialist, and SOAR Local Lead
Montgomery County, Pennsylvania

May 24, 2022



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Referral System

- Setting up the referral system
 - Based on SOAR training materials
 - Information from the course
 - Other referral paperwork for various programs
- Amending the referral forms
 - Simplifying the forms
 - Including equity

SOAR Candidacy Training

- Educating the community
 - SOAR Roles and Referral Provider Roles
 - Mandatory SOAR Training for ALL Referral Providers
 - More referrals
 - Appropriate referrals
 - Engage clients in medical treatment – more clients connecting to care
 - Avoid clients repeatedly sharing trauma histories and reliving trauma

Visiting Nurse Association Community Services

SOAR Training

SOAR Candidacy Training: Roles

- **Referral Source**
 - Evaluating Clients
 - Referring Clients
 - Providing Supporting Documentation

- **SOAR Program**
 - Completing SSI/SSDI Applications
 - Advocating for client approval

Substantial Gainful Activity

- Substantial- significant and productive physical or mental activities
- Gainful- done for pay or profit
- Earnings- must be \$1,350 or less per month in 2022

SSA's Definition of Disability

- “Inability to engage in Substantial Gainful Activity (SGA) due to a medically determinable impairment, or a combination of impairments, expected to last 12 months or result in death.”

SOAR Candidacy Training: Evaluating SOAR Applicants

- Requirements:

- Applicant has a serious mental illness or exhibits symptoms and/or has serious physical illnesses that affect his/her ability to work at a substantial gainful level (2022: \$1,350/month)
- The illness(es) or condition(s) have lasted or are expected to last for at least 12 months or result in death
- Individual is currently exhibiting symptoms of mental illness or has periods with worsening of symptoms that prevents sustainable employment.
 - Psychotic Symptoms
 - Manic Symptoms
 - Cognitive Deficits
 - Depressive Symptoms
 - Anxious Feeling
 - History of Trauma

SOAR Candidacy Training: Evaluating SOAR Applicants

- Applicants with a mental illness:
 - The applicant must have at least 2 marked restrictions in the following functional areas:
 - Understand, remember, or apply information- memory, following instructions, solving problems
 - Interact with others- getting along with others, anger, avoidance, etc.
 - Concentrate, persist, or maintain pace- task completion, focusing on details, distractibility at work, etc.
 - Adapt or manage oneself- hygiene, responding to change, setting realistic goals, etc.

SOAR Candidacy Training: Referring SOAR Applicants

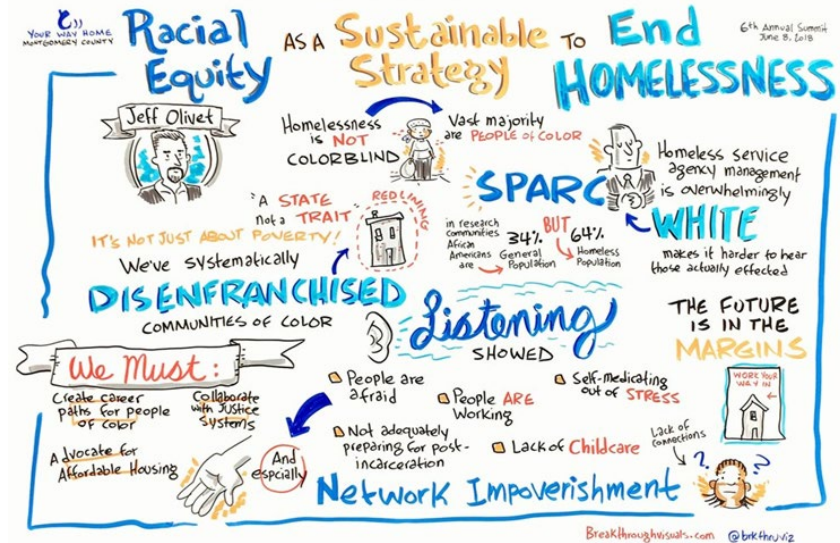
- Complete 3 forms (referral form, release, SSA-1696)
- Send completed forms to SOAR Program via fax or email
- New Process due to COVID includes additional SSA Forms
 - SSA-827
 - SSA-16

Visiting Nurse Association Community Services

Referral Form

Ensuring Equity

- Expanded to include Case Management
- Tracking measurable data
- Connecting clients to psych evals to avoid barriers with CEs
- Addressing COVID Barriers
 - Checking in with clients during pandemic



Thank You

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

Katie Lundy

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www.samhsa.gov

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

SOAR Referrals Included in Houston's Coordinated Entry System

Lyla Ordoñez
Program Administrator- SOAR/Co- Community Lead/
Texas State Lead
Avenue 360
Houston, Texas

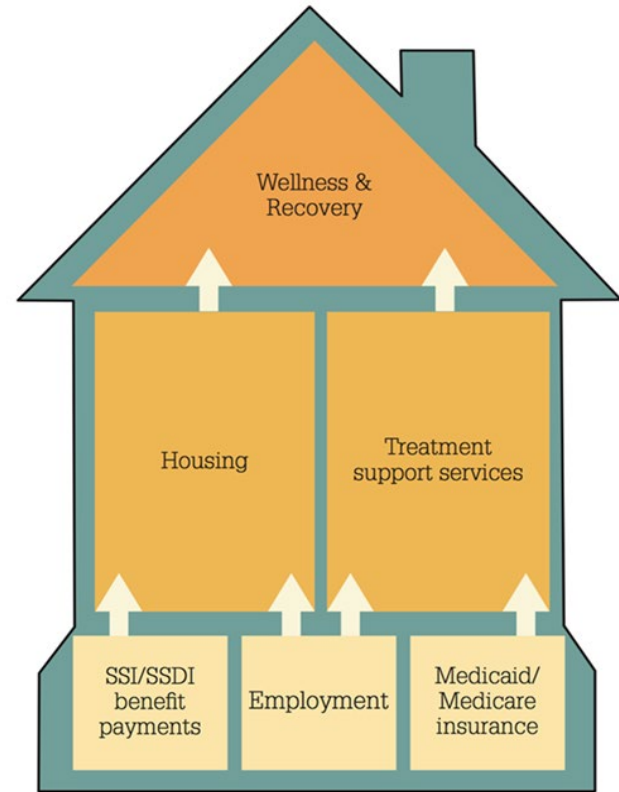
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SOAR: A Foundation for Recovery and Resiliency

- More than income!
- Access to health care and housing
- Increased education and employment opportunities
- Decrease in incarcerations and hospitalizations
- So, how does an individual get referred to SOAR in Houston?



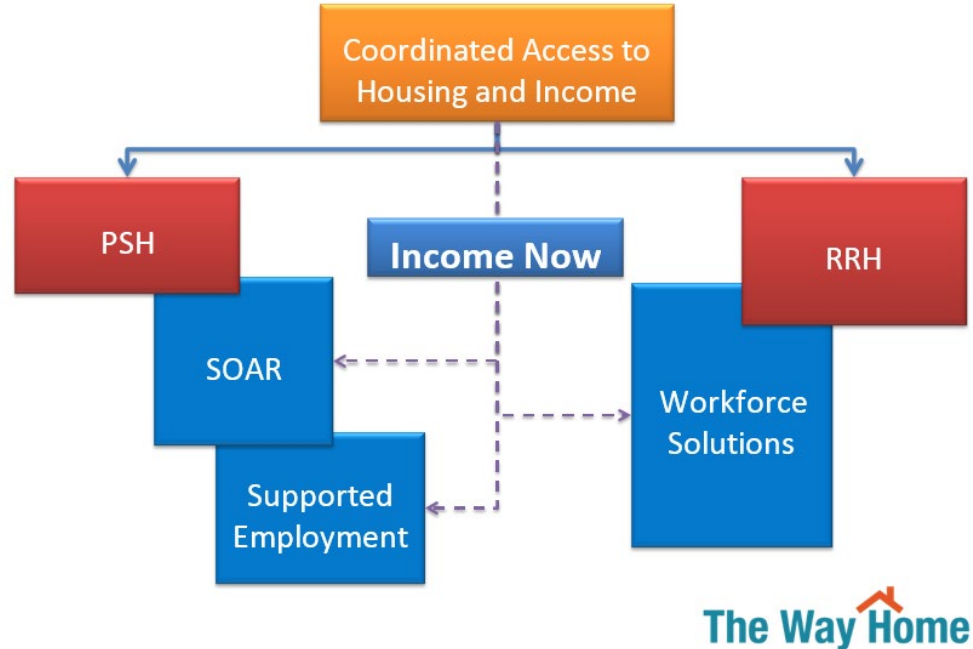
Houston's "The Way Home" CoC Coordinated Access

- Integrates housing assessment with income assessment
- Matches people at risk for homelessness (Diversion) to Income Now Program or Shelters to Shelters
- Matches people experiencing homelessness (Rapid Rehousing/Permanent Supportive Housing) to:
 - SOAR, if unable to work due to a disability
 - Vocational Rehabilitation Services, if client has a disability and wants to work
 - Employment programs, if unemployed or underemployed



Coordinated Access in Houston, Texas

- Applicant presents at a coordinated entry HUB.
- If the applicant meets the eligibility criteria *Income Now* matches them directly with a SOAR-trained case manager.
- The applicant may also be involved in supported employment or search for mainstream competitive employment.



Coordinated Access (CA): SOAR Applicant Criteria

The applicant is placed on the SOAR waitlist if they want to apply for disability income and says “yes” to all the following:

- Has a disabling psychiatric or physical condition which is expected to last 12 months or longer or will end in death
- Does not receive income from SSI/SSDI
- Has earned income of less than \$1,350/month
- Is not currently applying for disability income

Referrals at CA Assessment- No Medical Part 1

Applicant wants to apply for SSI/SSDI benefits, but has no medical history or diagnosis:

Waitlist

- Based on answers to disability questions on CA Assessment, client is added to the SOAR Waitlist

SOAR Referral

- When a SOAR Expansion provider requests referrals, CFTH creates referral in HMIS and sends to provider
- CFTH updates SOAR Waitlist

Add Services to HMIS

- SOAR Case Manager accepts referrals in HMIS and contacts client
- Client states no medical history or diagnosis
- SOAR Case Manager thinks could be disabled, refers to SOAR Navigator (HMIS)
- SOAR Case Manager closes out referral

Referrals at CA Assessment- No Medical Part 2

Applicant wants to apply for SSI/SSDI benefits, but has no medical history or diagnosis:

Referral to SOAR Navigation

- Accept SOAR Navigation Referral
- Enroll in SOAR
- Sends SSA-3288 form to SSA and uploads completed COVID form if not already uploaded to HMIS

SOAR Navigation

- Connect with Medical Services
- After SOAR Ready, refer to internal SOAR CM, if not available notify CFTH to add to waitlist with comment, “SOAR Ready,” and exit enrollment

Referrals at CA Assessment- Medical History Part 1

Applicant wants to apply and has a medical history or diagnosis:

Waitlist

- Based on answers to disability questions on CA Assessment, client is added to the SOAR Waitlist

SOAR Referral

- When a SOAR Expansion provider requests referrals, CFTH creates referral in HMIS and sends to provider
- CFTH updates SOAR Waitlist

Add Services to HMIS

- SOAR Case Manager Accepts Referrals in HMIS and contacts client
- Sends SSA-3288 to SSA and uploads completed COVID form to HMIS

Referrals at CA Assessment- Medical History Part 2

Applicant wants to apply and has a medical history or diagnosis:

SOAR Case Management

- Client states has medical history or diagnosis
- Enroll in SOAR (HMIS)
- Complete Forms
- Refer to SOAR Navigation if need help obtaining additional Medical Records or Signature on MSR

SOAR Navigator Assistance

- Accept SOAR Navigation Referral
- Obtain medical records or MSR signature
- Add services under current SOAR enrollment
- Update referral
- Notify SOAR case manager when assistance completed

Final Thoughts

- Including employment along with SOAR in your Coordinated Entry system helps:
 - people who want to work, find work.
 - homeless service providers do their jobs more effectively.
 - Public Housing Agencies improve their performance.
 - property owners with increased rent payment in subsidized housing.
 - people with employment income may be able to afford housing without subsidies.

Thank You

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Lyla Ordoñez

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Questions and Answers

Please type your
questions into the
Q&A box.



Resources

- SOAR Referral Process Workflow Toolkit
 - [https://soarworks.samhsa.gov/sites/soarworks.prainc.com/files/Sample SOAR Referral Application Tool 0.docx](https://soarworks.samhsa.gov/sites/soarworks.prainc.com/files/Sample%20SOAR%20Referral%20Application%20Tool%200.docx)
- SOAR and Coordinated Entry
 - <https://soarworks.samhsa.gov/article/soar-and-coordinated-entry>
- Applicant Self-Help Guide
 - <https://soarworks.samhsa.gov/article/applicant-self-help-guide>

Next Steps

- ✓ Download and review referral system tools and resources
- ✓ Learn more about your referral systems
- ✓ Begin to have the conversations with your SOAR leadership team about creating or improving referral systems which are more equitable
- ✓ Contact your SAMHSA SOAR TA Center Liaison with questions and to discuss more about designing equitable referral systems

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