

**SAMHSA SOAR TA Center**

The title of the user guide, "SOAR Online Application Tracking (OAT) User Guide", is displayed in a large, bold, dark blue, sans-serif font. A vertical yellow line is positioned to the left of the text.

# **SOAR Online Application Tracking (OAT) User Guide**

**Entering SOAR Outcomes and Running Reports**

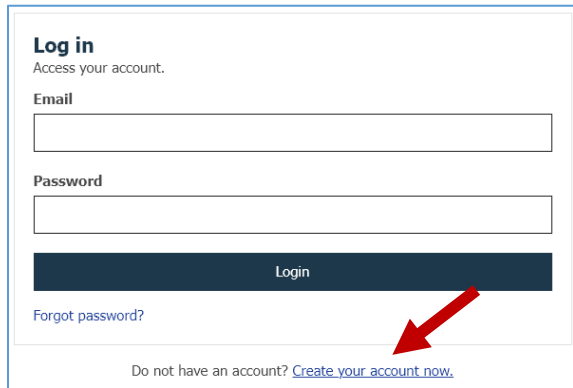
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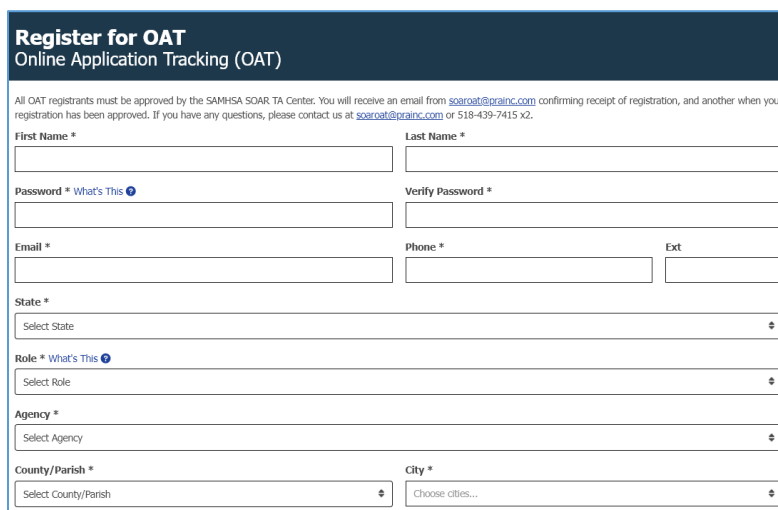
## User Registration and Login

### Register for OAT

Go to the [SOAR OAT website](#) and click on “Create your account now” in the User Log-In box.



### Complete the Registration Form



**Demographics:** First Name, Last Name, Email, Phone, State, County, and City.

- Please use your **agency** contact information and location.
- You must use a valid email address.

**Create a password:** Your password must be at least 8 characters and contain *at least 3* of the following: Uppercase Letter, Lowercase Letter, Number, and/or Special Character.

**User Roles:** There are **four roles** in OAT, each outlined below. Please note you can only choose one. All roles include the capability to enter your own cases *if you have passed the SOAR Online Course*.

- **State Lead:** Directs the SOAR initiative at the state level; has access to state-wide data
- **Local Lead:** Has attended a 3-day SOAR Leadership Academy; has access to data from all agencies within specified cities/counties
- **Agency Lead:** Oversees case workers; has access to data from all case workers at their agency
- **Case Worker:** Has access only to own data entered

**Are you a Supervisor Only (Will not be entering application outcomes)?** If you chose Agency/Local/State Lead as your role, this follow-up question will be asked. Answer “Yes” if you will *not* be entering your own outcomes but need access to OAT for supervisory or data-collection purposes. This will bypass the SOAR training requirement; however, you are strongly encouraged to enroll in and review the [SOAR Online Course](#).

**Agency:** Choose your Agency from the drop-down list.

- If your agency is not listed, choose “Other – Agency not listed below” and enter your Agency Name in the box provided.

**Funding:** Select how your position is funded.

- If you choose “State/County/Local,” a “State Options” box may appear, depending on your state.
- If you choose “VA (VAMC, HUD-VASH, etc.),” you will be asked for your VISN.

**Training:** To enter outcomes of SOAR-assisted applications into OAT, you **must have passed** the *SOAR Online Course*. Exceptions may be made for those who attended a 2-day *Stepping Stones to Recovery* training or a 4-day *Train-the-Trainer* prior to July 2020, depending on your SOAR involvement since training completion.

- *SOAR Online Course*: Adult or Child Curriculum
- 2-day *Stepping Stones to Recovery* training
- 4-day *Train-the-Trainer*
- 3-day *SOAR Leadership Academy*

## Registration Approval

When you submit your registration, you will receive an email from [soaroat@prainc.com](mailto:soaroat@prainc.com) letting you know that it is pending. If any information needs to be clarified, the SOAR OAT administrator will contact you. When your registration is approved, you will receive another email welcoming you to OAT! You cannot log in until you have received this approval email.

## Log in to OAT

**Multifactor Authentication:** Upon log-in you will be emailed a One-Time Security Code that you must enter on the site to complete your login. You must do this every time you log in.

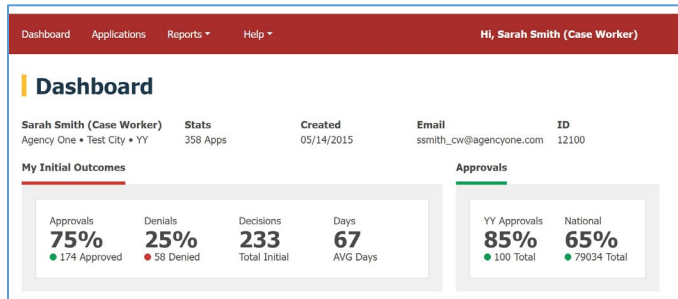
**60-day Password Reset:** Your OAT password must be reset every 60 days. Upon login, you will be asked to create and verify a new password.

**If you forget your Password:** Click “Forgot password?” on the Login page and enter your email address. You will receive an email with a temporary password. Click the link provided, enter the temporary password, and follow the prompts to create a new password and log in.

## OAT Dashboard

### Dashboard Sections

#### User Details and Stats



#### User Information

- Name (OAT Role), Agency, City, State; Email; User ID
- **Stats:** Total number of applications *you* have entered into OAT regardless of type or decision status
- **Created:** Date OAT account was created

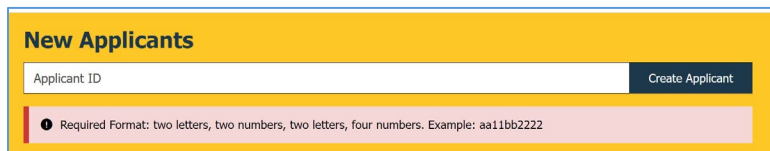
#### My Initial Outcomes

- Outcomes of *your* initial applications that have a decision entered into OAT.

#### Approvals

- **State/National Approval Rate:** Based on outcomes reported in the previous fiscal year, including those reported by the state that were not entered into OAT.

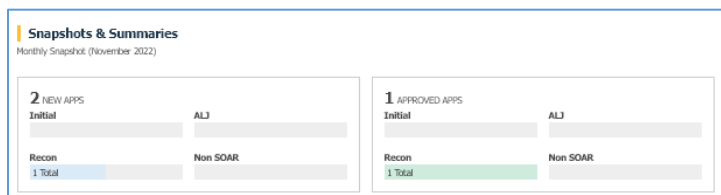
#### New Applicants



The screenshot shows the 'New Applicants' form. It has a yellow header with the title 'New Applicants'. Below the header is a text input field for 'Applicant ID' and a 'Create Applicant' button. A red error message is displayed below the input field: 'Required Format: two letters, two numbers, two letters, four numbers. Example: aa11bb2222'.

- This gold-colored box is where you can create a new Applicant ID. *Please see the Entering Applications section below.*
- If you are an Agency/Local/State Lead in a “Supervisor-Only” role, you will not see this box.

#### Snapshots and Summaries



#### Monthly Snapshot

- Displays *your* OAT activity for the current month: New Applications created and Approvals for each application type.

~ THE REMAINDER OF THE DASHBOARD DIFFERS BASED ON OAT ROLE ~

## Case Worker

### Applications Grid

#### PENDING APPLICATIONS

Pending Applications

All Applications

Application Type

Show All

Show All

Initial SOAR Application

Reconsideration using SOAR

ALJ Hearing using SOAR

Non-SOAR Claim

Export CSV

Search Applications

ApID	PFD Date	App Date	Type	Status	Actions
ti22bb2020	-	-	ALJ Hearing using SOAR	Pending	Continue
ca56fi1964	-	-	Initial SOAR Application	Pending	Continue
df34df4512	-	-	ALJ Hearing using SOAR	Pending	Continue

- **Application Type:** You can filter by Application Type (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).
- **Columns:** ApID; PFD (Protective Filing Date); Application Submission Date, Type, and Status; Actions.
- **View/Edit Application:** Click on the ApID or “Actions: Continue” to add/edit case details.

#### ALL APPLICATIONS

Pending Applications

All Applications

Application Type

Show All

Show All

Initial SOAR Application

Reconsideration using SOAR

ALJ Hearing using SOAR

Non-SOAR Claim

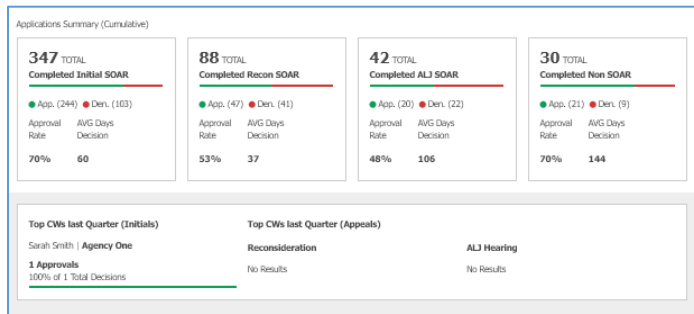
Search Applications

ApID	Current App	Status	Days	# Apps	Actions
aa11aa1110	Initial SOAR Application	Denied	0	2	Actions
aa11bb2020	Initial SOAR Application	Archived	-	0	Continue
aa11bb2224	Initial SOAR Application	Approved	62	1	Actions

- **Application Type:** You can filter by Application Type (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).
- **Columns:** ApID; Current Application Type and Status; Days to Decision; # of application types this ApID has progressed through (e.g., Initial → Reconsideration = 2); Actions
- **View/Edit Application:**
  - Pending cases: Click on the ApID or “Actions: Continue” to add/edit case details.
  - Approved or Denied cases:
    - Click on “Actions: Edit Application” to add/edit [Tab 5-Post Decision](#) information.
    - Click on the ApID or “Actions: Overview” to see the Application Overview.

## Agency Lead

### Snapshots and Summaries



### APPLICATIONS SUMMARY (CUMULATIVE)

- Approval Rates and Average Days to Decision for all your Agency's completed applications.
- Top Case Workers within your agency based on approval rates for Initial applications and Appeals.

## Applications Grid

### PENDING APPLICATIONS

Pending Applications Agency One Case Workers

Users: Show All Export CSV

Show 10 Search Applications

ApID	PFD Date	App Date	Case Worker	Type	Status	Actions
vb71ss4513	-	-	Smith, Sarah	Initial SOAR Application	Pending	Continue
t22bb2020	-	-	Smith, Sarah	ALJ Hearing using SOAR	Pending	Continue
ca56f1964	-	-	Smith, Sarah	Initial SOAR Application	Pending	Continue

- **Users:** You can filter by Case Worker name.
- **Columns:** ApID; PFD; Application Submission Date; Case Worker; Application Type and Status; Actions
- **View/Edit Applications:** Click on the ApID or "Actions: Continue" to add/edit case details.

### [YOUR AGENCY] CASE WORKERS

Pending Applications Agency One Case Workers

Users: Show All

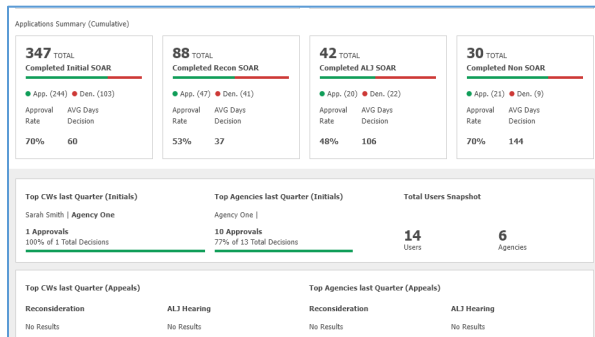
Show 10 Search Users

Case Worker	Approvals/Denials	Decisions	Days	Actions
Kilpatrick, Mike	/	0	0	Actions
Kilpatrick, Mike	/	0	0	Actions
NextStepTesting, Nate	2 / 6	8	1	Actions

- **Users:** You can filter by Case Worker name.
- **Columns:** Case Worker; Approvals/Denials; Total Decisions; Average Days to Decision; Actions
- **View Applications:** Click "Actions: View Cases" to go to that Case Worker's "Applications" page.

## Local Lead

### Snapshots and Summaries



### APPLICATIONS SUMMARY (CUMULATIVE)

- Approval Rates and Average Days to Decision for completed applications in your assigned cities/counties
- Top Case Workers and Agencies in your assigned cities/counties based on approval rates for Initial applications and Appeals
- Total Users Snapshot: Total number of users and agencies in your assigned cities/counties

## Applications Grid

### PENDING APPLICATIONS

Pending Applications								
All Applications								
<div>Users</div> <div>Show All</div> <div>Export CSV</div>								
<div>Show 10</div> <div>Search Applications</div>								
ApID	PFD Date	App Date	User	Role	Type	Status	Actions	
az12za1234	11/07/22	11/08/22	Smith, Sarah	Case Worker	Initial SOAR Application	Pending	Continue	
bi18al2018	12/20/17	-	Smith, Sarah	Local Lead	Reconsideration using SOAR	Pending	Continue	

- **Users:** You can filter by Case Worker name.
- **Columns:** ApID; PFD; Application Submission Date; Name and Role; Application Type and Status; Actions
- **View/Edit Applications:** Click on the ApID link or “Actions: Continue” to add/edit case details.

## All Applications

Pending Applications						
All Applications						
<div>Users</div> <div>Show All</div>						
<div>Show 10</div> <div>Search Applications</div>						
ApID	Current App	Current Status	Days	# Apps	Actions	
aa11aa1110	Initial SOAR Application	Denied	0	2	Actions	
aa11bb2020	Initial SOAR Application	Archived	-	0	Continue	
aa11bb2224	Initial SOAR Application	Approved	62	1	Actions	

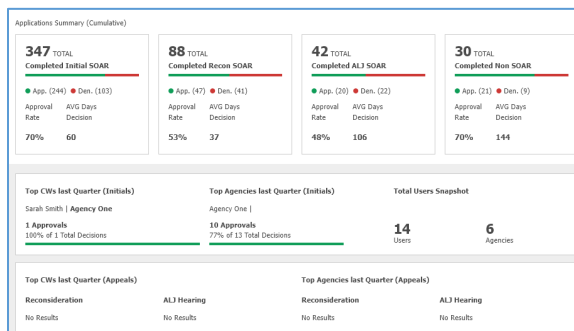
- **Users:** You can filter by Case Worker name.



- **Columns:** ApID; Current Application Type and Status; Average Days to Decision, # of application types this ApID has progressed through; Actions.
- **View/Edit Applications**
  - Pending cases: Click on the ApID **or** “Actions: Continue” to add/edit case details.
  - Approved or Denied cases:
    - Click on “Actions: Edit Application” to enter [Tab 5-Post Decision](#) information.
    - Click on the ApID link **or** “Actions: Overview” to see the Application Overview.

## State Team Lead

### Snapshots & Summaries



### APPLICATIONS SUMMARY (CUMULATIVE)

- Approval Rates and Average Days to Decision for all completed applications in your State
- Top Case Workers/Agencies in your State based on approval rates for Initial applications and Appeals
- Total Users Snapshot: Total number of users and agencies in your State

## Applications Grid

### [YOUR STATE] AGENCIES

Test State Agencies							
All Users				Pending Applications			
County/Parish		Agency					
Show All		Show All					
Show 10				Search Agencies			
Agency	Agency Lead	Local Lead	Approvals/Denials	Days	Initial	Decisions	Actions
Agency One	Smith, Sarah	Smith, Sarah	298 / 149	59	329	447	Actions
Agency One for Training	Nagele, Josef		-	0	-	-	Actions

- **County/Agency:** You can filter by County and/or Agency.
- **Columns:** Agency; Agency Lead; Local Lead, Approvals/Denials; Average Days to Decision; Initial Applications Entered; Decisions (for all application types), Actions.
- **View Users/Applications**
  - Click on Agency Name to view all users from that agency.
  - Click on Agency Lead or Local Lead name to go to that user’s “Applications Page.”
  - Actions:
    - View Applications: View all applications from that agency
    - View Users: View all users from that Agency.

## ALL USERS

Test State Agencies All Users Pending Applications								
Show 10		Search Users						
Created ↑	Last	Email	St	Role	Agency	Status	Actions	
05/14/15	Smith	ssmith_st@agencyone.com	YY	State Lead	Agency One	Approved	Actions	
05/14/15	Smith	ssmith_ll@agencyone.com	YY	Local Lead	Agency One	Approved	Actions	
05/14/15	Smith	ssmith_al@agencyone.com	YY	Agency Lead	Agency One	Approved	Actions	
05/14/15	Smith	ssmith_cw@agencyone.com	YY	Case Worker	Agency One	Approved	Actions	
05/14/15	Jones	ljones_cw@agencytwo.com	YY	Case Worker	Agency Two	Inactive	Actions	
05/14/15	Harris	sharris_al@agencytwo.com	YY	Agency Lead	Agency Two	Inactive	Actions	

- **Columns:** Date OAT Account Created; User Last Name, Email, State, Role, Agency, and Status; Actions
- **View Agencies/Users/Applications**
  - Click on the user's Email or "Actions: View Cases" to go to the user's "Applications" page.
  - Click on Agency Name to view all Users registered in OAT from that Agency.

## PENDING APPLICATIONS

Test State Agencies All Users Pending Applications								
Application Type		Export CSV						
Show All								
Show 10		Search Applications						
ApID	PFD Date	App Date	Agency	Case Worker	Type	Status	Actions	
jo77bo1999	-	-	Agency One	Smith, Sarah	ALJ Hearing using SOAR	Pending	Continue	
ma78ca4104	-	-	Agency One	Smith, Sarah	Initial SOAR Application	Pending	Continue	
ri33gg9874	-	-	Agency One	Smith, Sarah	Initial SOAR Application	Pending	Continue	
zz66ff4532	-	-	Agency One	Smith, Sarah	Initial SOAR Application	Pending	Continue	

- **Application Type:** You can filter by Application Type (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).
- **Columns:** ApID; PFD; Application Submission Date; Agency; Case Worker; Application Type and Status; Actions. Sort by any column by clicking on the heading.
- **View/Edit Applications:** Click on the ApID or "Actions: Continue" to enter additional information about a case.

## Entering Application Outcomes

### Create an Applicant Identification Number (ApID#)

The use of an ID number avoids the need to enter personally identifiable information (PII).

- **BE SURE TO RECORD THE ID# IN THE APPLICANT'S CASE FILE.**
- The required sequence for the ID is as follows: [Two Letters] [Two Numbers] [Two Letters] [Four Numbers] **Example:** aa11bb2222
- ApIDs can only be used once across all OAT users.

New Applicants

Create Applicant

Required Format: two letters, two numbers, two letters, four numbers. Example: aa11bb2222

### Enter Application Information

#### Tab 1: Demographics

te95st3004

Demographics

Created on 09/22/2022 by Sarah Smith | Updated on 09/27/2022 by Sarah Smith

1. Demographics

2. Application Type

3. Application Detail

4. Decision

5. Post Decision

1 of 5 Demographics

Gender \* What's This

Male

Age \*

85

Military Service \*

☒ Yes
 ☐ No
 ☐ Don't Know

Discharge Status: \*

Honorable

Was the applicant receiving VA Disability Compensation at the time of the application? \*

Yes

Was the applicant receiving county, state or other public assistance (cash or health insurance) prior to applying for SSI/SSDI? \*

☐ No
 ☒ TANF
 ☐ General/Public Assistance
 ☐ Medicaid
 ☐ Don't Know

Was the applicant working during the application process? \*

Yes

Applicant Working Earnings per Month (in dollars) \*

42

What was the applicant's housing status at the time of the application? \*

Outdoors (e.g., street, abandoned or public building)

Length of time homeless \* What's This

5

Years

5

Months

Save & Continue

Cancel

**Gender:** Choose from multiple options including Other/Please Specify.

**Age:** Enter the applicant's age at the time of application.

- If 18 or over, the application will be tracked as an adult application for both SSI and SSDI.
- If 17 or under, the application will be tracked as a child application for SSI.
- If you are completing an adult SSI/SSDI application for a 17-year-old who is soon turning 18, enter 18 to track it as an adult claim.

**Race:** Choose from multiple options, including Other/Please Specify.

**Hispanic, Latino/a, or Spanish Origin:** If "Yes," a follow-up question will allow you to choose an ethnicity. Hold down the Control (Ctrl) key to select more than one response while selecting.

**Legal System Involvement:** If “Yes,” a follow-up question will ask about the type of involvement. Hold down the Control (Ctrl) key to select more than one response while selecting.

**Military Service:** If “Yes,” two follow-up questions will ask about military discharge status and VA Disability Compensation at the time of the application.

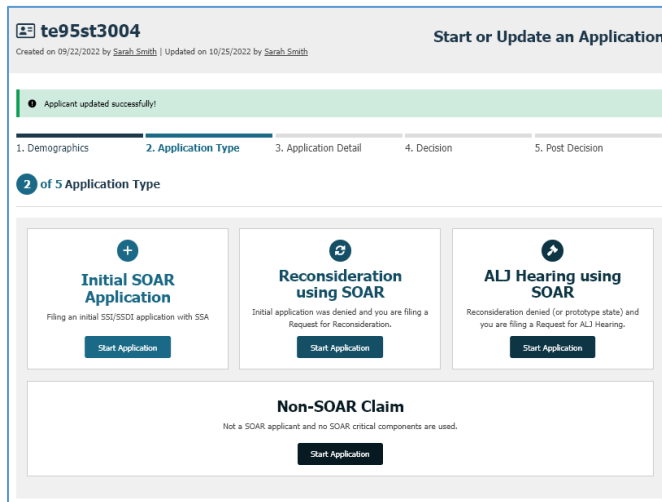
**County, State, or other public assistance:** Hold down the Control (Ctrl) key to select more than one response while selecting.

**Employment Status:** If the applicant was working during the application process, a follow-up question will ask about Working Earnings per Month (in dollars).

### Housing Status

- The first three options are for individuals who are experiencing “literal” homelessness. The remaining options are considered at-risk of homelessness.
- Length of time homeless (in years and months): Enter the length of time the applicant was experiencing “literal” homelessness prior to working on the SOAR application OR prior to entering the current (at-risk) housing situation.

## Tab 2: Application Type



## Application Types

**SOAR Claims:** SOAR-trained case worker is assisting an individual who is experiencing **OR** at risk of homelessness **AND** has a mental illness, medical impairment, and/or co-occurring substance use disorder to apply for SSI/SSDI utilizing the *SOAR Critical Components*.

- **Initial SOAR Application:** Case worker is assisting with an initial application.
- **Reconsideration:** Case worker is assisting an applicant who has received an initial application denial.
- **ALJ Hearing:** Case worker is assisting an applicant who has received a reconsideration denial.

**Non-SOAR Claim:** Applicant is not currently experiencing or at-risk of homelessness **OR** does not have a mental illness, medical impairment, and/or co-occurring substance use disorder **OR** the *SOAR Critical Components* were not used in the application process. This application type should be rarely or never selected by SOAR providers.

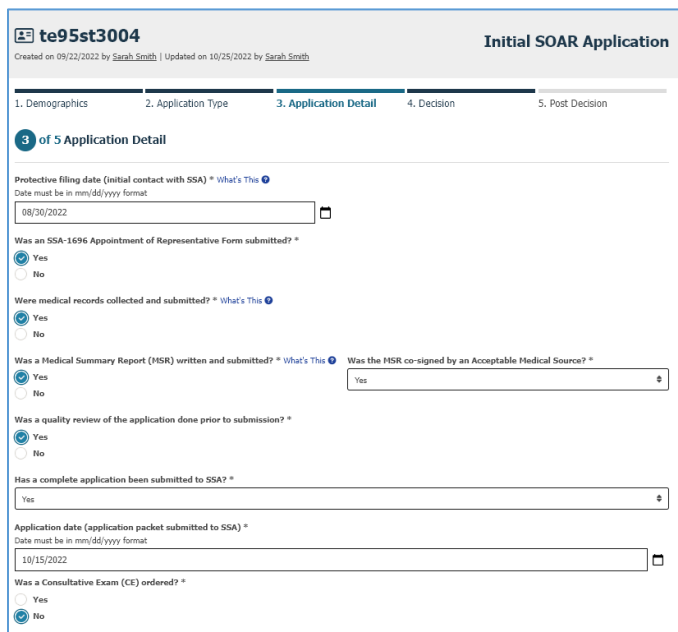
## Changing Application Type

If you make an error, you can change the application type without losing demographic information – however, **all other information entered will be deleted**. Click the “Change Type” button on the bottom right-hand side of Tab 3 or 4. This option is no longer available once a decision has been entered and saved on Tab 4.

Change Type

**\*\*THE INFORMATION COLLECTED ON TABS 3-5 WILL VARY DEPENDING ON APPLICATION TYPE\*\***

## Tab 3: Application Detail



**te95st3004** Initial SOAR Application  
Created on 09/22/2022 by Sarah Smith | Updated on 10/25/2022 by Sarah Smith

1. Demographics 2. Application Type 3. Application Detail 4. Decision 5. Post Decision

3 of 5 Application Detail

Protective filing date (initial contact with SSA) \* What's This ?  
Date must be in mm/dd/yyyy format  
08/30/2022

Was an SSA-1696 Appointment of Representative Form submitted? \*  
☒ Yes ☐ No

Were medical records collected and submitted? \* What's This ?  
☒ Yes ☐ No

Was a Medical Summary Report (MSR) written and submitted? \* What's This ? Was the MSR co-signed by an Acceptable Medical Source? \*  
☒ Yes ☐ No Yes

Was a quality review of the application done prior to submission? \*  
☒ Yes ☐ No

Has a complete application been submitted to SSA? \*  
Yes

Application date (application packet submitted to SSA) \*  
Date must be in mm/dd/yyyy format  
10/15/2022

Was a Consultative Exam (CE) ordered? \*  
☐ Yes ☒ No

## All Application Types

**SOAR Critical Components:** These steps are critical to the success of applications for eligible individuals. Indicate whether you completed the following *SOAR Critical Components*:

- Submitted the SSA-1696: Appointment of Representative form
- Collected and submitted (or will be submitting to DDS) medical records
- Submitted (or will be submitting to DDS) a Medical Summary Report (MSR); a follow-up question will ask about obtaining a signature from an Acceptable Medical Source (AMS).
- Completed a quality review of the application packet prior to submission.
  - This may be performed by a supervisor, SOAR-trained colleague, or SOAR Local Lead.
  - This may also include a review of the Medical Summary Report by the SAMHSA SOAR TA Center.

**Was a consultative examination (CE) ordered?** Disability Determination Services orders a CE when there is not sufficient medical evidence to make a decision. If a CE was ordered, a follow-up question will ask for the number of CEs ordered.

## Initial Application Only

**Protective Filing Date (PFD):** Enter the date on which you or the applicant notified SSA of their intent to file (by calling SSA, going into the local SSA field office, or initiating the online disability application).

### Has a complete application been submitted to SSA?

*If you haven't yet submitted the application but intend to, leave this unanswered.*

- Choose “Yes” **only** if you **have submitted** a complete application packet to your local SSA office.
  - A follow-up question will ask for the Application Date. Enter the date the packet was delivered to the local SSA field office. *This date cannot be before the PFD.*
- Choose “No” **only** if you **do not intend** to submit the application.
  - A follow-up question will ask why the application **will not be submitted**, (e.g., applicant moved/disappeared, withdrew, etc.)
  - The case will be closed and archived.<sup>1</sup>

Has a complete application been submitted to SSA? \*

No

Application will not be submitted to SSA due to: \*

Select Below Only if Not Submitting

Save Progress and Return to Dashboard
Save & Continue
Change Type

## Reconsideration Only

**Date of Request for Reconsideration:** Enter the date the Request for Reconsideration was filed.

## ALJ Hearing

**Date of Request for ALJ Hearing:** Enter the date the request for an ALJ hearing was filed.

**Was an expedited hearing requested?** A request was made to expedite the scheduling of a hearing due to dire need.

**Did the applicant have an attorney?** Even if the applicant had an attorney, if you collected medical records, wrote and submitted an MSR, and assisted with the application, you should track the outcome in OAT.

**Was an On-the-Record review request submitted?** This is a written request asking the Office of Hearing Operations (OHO) to make a favorable decision based on the evidence in the case record.

- If “Yes,” a follow-up question will ask if the decision was granted (i.e., approved) On-the-Record.
- If the application was approved on the record, you will proceed to Tab 4. If the application was not approved, you will continue to enter information about the ALJ hearing date.

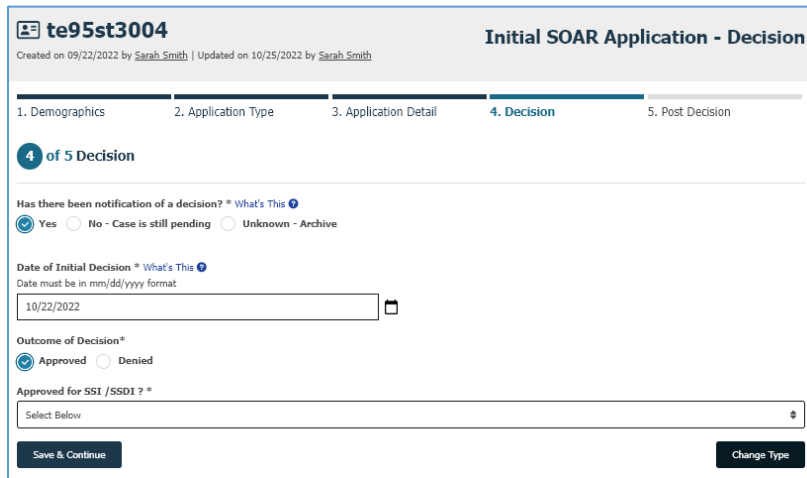
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<sup>1</sup> Archived cases can be viewed from the Applications page only and will not appear on the user’s Dashboard.

### Has a hearing date been scheduled?

- If “Yes,” a follow-up question will ask for the Date of the ALJ hearing (this can not be a future date).
- Choose “Unknown” **only** if the hearing **will not be** scheduled.
  - A follow-up question will ask why the hearing **will not be** scheduled.
  - The case will be closed and archived.

## Tab 4: Decision



### Has there been notification of a decision? (Initial and Reconsideration Only)

*For adult SSI/SSDI applications, if have not received decisions for Both SSI and SSDI applications, leave this question unanswered or choose “No-Case is still pending”*

- For adult SSI/SSDI applications, choose “Yes” **ONLY** if you have received decisions for **BOTH** the SSI **AND** SSDI claims.
- Choose “Unknown” **only** if the outcome **will remain** unknown, (i.e., applicant withdrew, etc.)
  - A follow-up question will ask why the outcome **will remain** unknown.
  - The case will be closed and archived.

**Date of Decision:** Use the date on the SSA letter that is mailed to the applicant and appointed representative.

**Outcome of Decision:** **DO NOT** answer this question until you have received a decision for **BOTH** SSI **AND** SSDI.

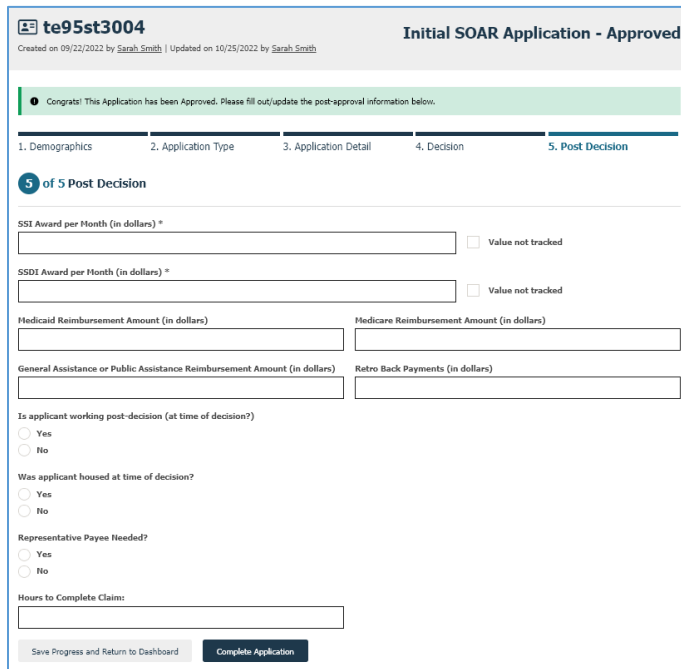
- If “Approved,” a follow-up question will ask what benefits the applicant was approved for.
  - **Options:** SSI only; SSDI only; or Both SSI and SSDI.
- If “Denied,” a follow-up question will ask the reason for denial (from the SSA letter).

**NOTE: ONCE A DECISION HAS BEEN ENTERED, INFORMATION ON TABS 1-4 CAN NOT BE CHANGED.** If you made an error, please contact [soaroat@prainc.com](mailto:soaroat@prainc.com) to request a correction.

## Tab 5: Post Decision

### Approvals

When an SSI/SSDI application has been approved at any level of adjudication (initial, reconsideration, or ALJ) the following questions will be asked. This information can be very helpful in sustaining SOAR initiatives both on the local and state levels. Other than Award Amounts, this section is optional.



**te95st3004** Initial SOAR Application - Approved  
Created on 09/22/2022 by Sarah Smith | Updated on 10/25/2022 by Sarah Smith

1. Demographics 2. Application Type 3. Application Detail 4. Decision 5. Post Decision

5 of 5 Post Decision

SSDI Award per Month (in dollars) \*

SSDI Award per Month (in dollars) \*

Medicaid Reimbursement Amount (in dollars)

Medicare Reimbursement Amount (in dollars)

General Assistance or Public Assistance Reimbursement Amount (in dollars)

Retro Back Payments (in dollars)

Is applicant working post-decision (at time of decision?)

Was applicant housed at time of decision?

Representative Payee Needed?

Hours to Complete Claim:

Save Progress and Return to Dashboard Complete Application

**Award Amounts:** If the award amount(s) are unknown, please *choose “Value not tracked” - do not enter “0”*.

**Medicaid/Medicare Reimbursement\*:** Providers can bill Medicaid retroactively up to 90 days prior to the SSI application date. You can often get this information from their billing departments with the proper release.

**General or Public Assistance Reimbursement:** Contact the state, local, or county agency that provides general or public assistance, if available in your state. You’ll need a proper release from the applicant. *Skip if unknown - do not enter “0”*.

**Retroactive Back Payments:** Enter any SSI and/or SSDI retroactive back payments received. *Skip if unknown - do not enter “0”*.

**Employment Information:** Answer “Yes” if the applicant was working at the time of decision, even if only for a few hours. A follow-up question will ask about monthly earnings.

**Housing Information:** Indicate whether the applicant was housed at the time of decision and whether their (pending) access to benefits facilitated the access to housing.

**Representative Payee:** Indicate whether a Representative Payee was needed and whether one was provided. This can be via referral/connection to services—it does not need to be you or your agency.

**Hours to Complete Claim:** As part of quality review and potential retraining, it is important to know how many hours it takes case workers to complete each claim. *Skip if unknown - do not enter “0”*.



## Denials

When an SSI/SSDI application has been denied, Post Decision questions will vary depending on application type.

**Initial Application:** Was a Request for Reconsideration filed?

- If “Yes,” you will be directed to [Tab 3: Application Detail for Reconsideration](#) (see Tab 3 instructions above).
- If “No,” the case is considered “closed” and you will be taken to the [Application Overview](#) page (see below).

**Reconsideration:** Has a request for an ALJ hearing been filed?

- If “Yes,” you will be directed to [Tab 3: Application Detail for ALJ](#) (see Tab 3 instructions above)
  - Do not select this option unless **YOU** are assisting with the ALJ Hearing. If you are referring the applicant to another agency or to an attorney, select “No.”
- If “No,” the case is considered “closed” and you will be taken to the [Application Overview](#) page.

**ALJ:** There are no Post Decision questions asked. You will be directed to the [Application Overview](#) page.

## Application Overview

This page can be viewed by clicking on any ApID# on your dashboard. It is also the page you are directed to once you have completed [Tab 5: Post Decision](#).

te34st5678

Created on 09/15/2022 by Mike Kilpatrick | Updated on 10/28/2022 by Mike Kilpatrick

Application Overview

Test City, YY

ALJ Hearing using SOAR - Approved

3 Total Decision(s)

Age: 35

Military: Yes

Working? No

Sex: Male

Assistance: No

Housing Status: Outdoors (e.g., street, abandoned or public building)

CASE WORKER

Kilpatrick, Mike

Agency One

Results

Initial SOAR

Reconsideration

ALJ Hearing

Current

Edit Application

Denied on October 13, 2022

Denied because:

No significant impairment.

Protective Filing Date:

10/12/2022

Application Date:

10/13/2022

Completed SSA 1696?

No

Medical Records Collected?

Yes

MSR

Yes

MSR Co-Signed?

Yes

Quality Review

Yes

CE Exam Ordered?

Yes

Applicant Created

GENDER

M

AGE

35

CASE WORKER

Kilpatrick, Mike

N/A

Initial SOAR Application - Details

APP DATE

10/13/22

SSA 1696?

No

MSR?

Yes

MEDICAL RECORDS

Yes

QUALITY REVIEW

Yes

October 12, 2022

Initial SOAR Application - Decision

STATUS

Denied

DECISION DATE

10/13/22

DAYS DECISION

0

October 13, 2022

Initial SOAR Application - Post Denial

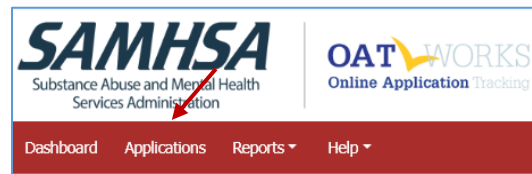
Denial

STATUS

Completed

- The applicant ID, applicant's demographic information, Case Worker, and Agency is provided at the top of the page. ▼
- The total number of decisions associated with the ApID is also noted at the top of the page. ▼
- Users can toggle between Initial SOAR, Reconsideration and ALJ Hearing details, if applicable. The word "Current" will appear next to the current application type. ▼
- An overview of the activity about the application as it progressed through application types is also provided. ▼

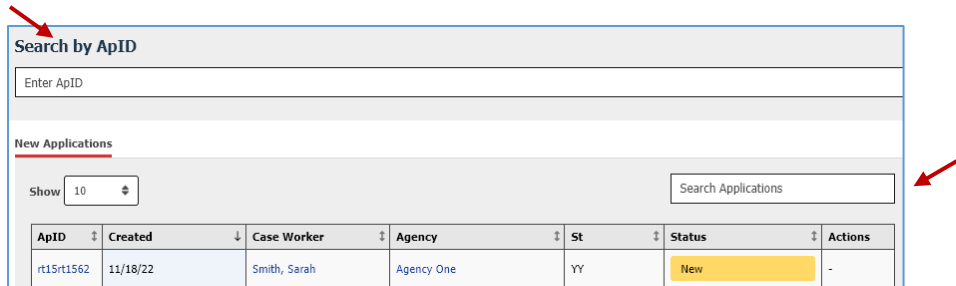
## Applications Page



- The Applications page allows all users to view the applications they have entered. SOAR Leads can also view applications entered by Case Workers from their assigned Agency, Cities/Counties, or State.
- Applications are grouped by Application Type: New, Initial SOAR, Reconsideration SOAR, etc.)
- **NOTE:** “New” SOAR cases designated in yellow are those for which an Application Type has not yet been selected. These will **only** appear here on the Applications page, **not** on the Dashboard.

### Search

- Enter an ApID into the “Search by ApID” box at the top of the page to search across all Application Types
- You can also enter an ApID into the “Search” box at the top of a particular Application Type



ApID	Created	Case Worker	Agency	St	Status	Actions
rt15rt1562	11/18/22	Smith, Sarah	Agency One	YY	New	-

### View/Edit Applications

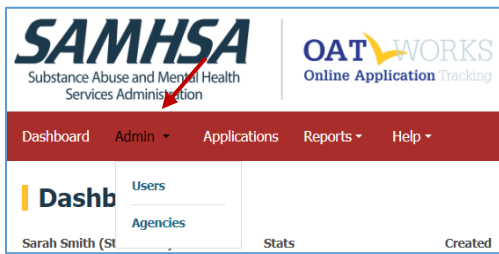
- New or Pending cases:
  - Click on the ApID or “Actions: Continue” to enter additional information about the case.
- Approved or Denied cases:
  - Click on the ApID link **or** “Actions: Overview” to see the Application Overview.
  - Click on “Actions: Edit Application” to enter Tab 5-Post Decision information.

### Filters

- Filter by Veteran Status, Age, Sex, Living Situation, Date ApID Created, and Application Status
- Additional Filters are available to SOAR Leads:
  - Agency Leads: User
  - Local and State Leads: User, Agency, County.
- Choose filters and click the blue “Filter” button. To clear all Filters, click “Reset.”



## Admin Options



SOAR Agency/Local/State Leads will also see “Admin” on the Menu bar. Drop-down options include Users and Agencies depending on role.

**All Users**

10 entries per page

Created	Login	First	Last	Email	St	Role	Agency	Cases	Status	Actions
05/14/15	05/31/24	Sarah	Smith	ssmith_ll@agencyone.com	YY	Local Lead	Agency One	50	Approved	Actions
05/14/15	05/30/24	Sarah	Smith	ssmith_al@agencyone.com	YY	Agency Lead	Agency One	23	Approved	Actions
05/14/15	06/11/24	Sarah	Smith	ssmith_cw@agencyone.com	YY	Case Worker	Agency One	344	Approved	Actions
05/14/15	06/03/15	Lucy	Jones	ljones_cw@agencytwo.com	YY	Case Worker	Agency Two	0	Inactive	Actions

**All Agencies**

10 entries per page

Agency	Created	County/Parish	St	Agency Lead	Users	Status	Actions
Agency One	09/01/16	Test County	YY	Smith, Sarah	10	Active	Actions
Agency Two	09/01/16	Test County	YY	Harris, Sam	9	Active	Actions
Agency One for Training	09/01/16	Test County	YY		1	Active	Actions

### Agency Leads:

- Can see all users in their agency.
- Filter by User Role, User Status (Approved/inactive)

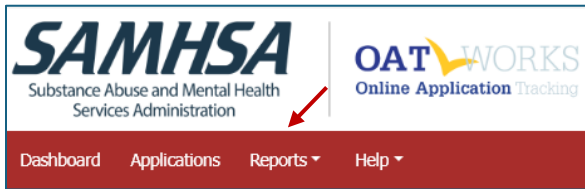
### Local Leads:

- Can see all users and agencies within their assigned cities/counties.
- **Users:** Filter by County, Agency, User Role, User Status (Approved/inactive)
- **Agencies:** Filter by Status (Active/Inactive)

### State Leads:

- Can see all users and agencies within their State.
- **Users:** Filter by County, City, Agency, User Role, User Status (Approved/inactive)
- **Agencies:** Filter by County and Status (Active/Inactive)

## Reports



### About Reports

- All Users can run “Individual” or “Summary” Reports. SOAR Leads can also run “User Summary Reports.”
- Only applications that have received a decision will appear in Reports.**

### Report Types

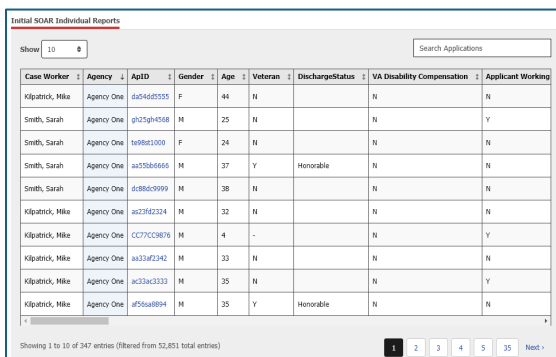
Reports can be used to celebrate the success of individual case workers, agencies, and localities that are promoting SOAR with great outcomes! Reports can also be used to identify additional training or support needs.

Role	Can Access Data From...	Reports Most Helpful For...
<b>Case Worker</b>	Own application entries*	Tracking successes and considering areas where technical support is needed to improve
<b>Agency Lead</b>	Case workers assigned to your agency	Considering targeted technical assistance or reviewing outcomes at steering committee meetings
<b>Local Lead</b>	Agencies and case workers in your assigned cities/counties	Reviewing outcomes across agencies and counties and considering areas for additional follow-up support
<b>State Lead</b>	All case workers/agencies across the state	Reviewing state plans, considering targeted technical assistance or support for particular agencies or localities

\* All Users/Roles can see their own application entries.

### Individual Reports

Individual reports display all data entered for cases *with decisions*.



Case Worker	Agency	ApID	Gender	Age	Veteran	DischargeStatus	VA Disability Compensation	Applicant Working
Kipatnick, Mike	Agency One	6a5465555	F	44	N		N	N
Smith, Sarah	Agency One	gh25gh4568	M	25	N		N	Y
Smith, Sarah	Agency One	h98921000	F	24	N		N	N
Smith, Sarah	Agency One	ae558b6666	M	37	Y	Honorable	N	N
Smith, Sarah	Agency One	61886-9999	M	38	N		N	N
Kipatnick, Mike	Agency One	ae238e2324	M	32	N		N	N
Kipatnick, Mike	Agency One	CC77CC3876	M	4	-		N	Y
Kipatnick, Mike	Agency One	ae33af2342	M	33	N		N	N
Kipatnick, Mike	Agency One	ac33ac3333	M	35	N		N	Y
Kipatnick, Mike	Agency One	af55ae8894	M	35	Y	Honorable	N	N

- Filter by applicant demographics (Veteran, Age, Sex, Race, Ethnic Group, Legal System, Living Situation) and/or Date of Decision. Click “Filter” to display the report.
  - SOAR Leads can also filter by User Name, Training Type, and Funding Type
  - Local and State Leads can also filter by County and Agency.
- Click on an ApID to see the Application Overview.
- Report can be exported as an Excel file.

## Summary Reports

Summary Reports provide easy-to-read overviews of aggregate data based on cases *with decisions*.

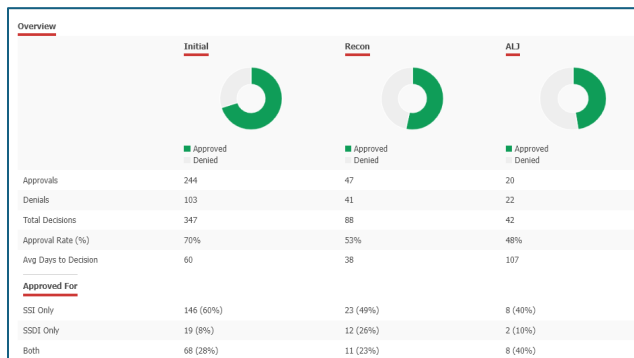
Summary Reports

**Report Type**  
☒ Overview (default)   ☐ Optional Information   ☐ Non-SOAR

- Choose Report Type
- Filter by applicant demographics (Veteran, Age, Sex, Race, Ethnic Group, Legal System, Living Situation) and/or Date of Decision. Click “Filter” to display the report.
  - SOAR Leads can also filter by User Name, Training Type, Funding Type.
  - Local and State Leads can also filter by County and Agency.
- Summary Reports can be exported to Excel or displayed as a PDF.

### Overview (Default)

This report displays outcomes, applicant demographics, housing status, and *SOAR Critical Components*.



### Optional Information

This report summarizes Post Decision information (e.g., Reimbursements, back payments, reasons for denial)

Optional Information	Initial SOAR	Reconsideration	ALJ Hearings
<b>Reimbursements</b>			
<b>Medicare</b>			
Total dollar amount	\$73,595.00 (33)	\$28,429.00 (13)	\$100.00 (1)
Average per applicant	\$2,230.15	\$2,186.85	\$100.00
<b>Medicaid</b>			
Total dollar amount	\$761,143.00 (87)	\$169,028.00 (22)	\$129,423.00 (4)
Average per applicant	\$8,748.77	\$7,683.09	\$32,355.75
<b>General or Public Assistance</b>			
Total dollar amount	\$67,437.00 (71)	\$17,280.00 (20)	\$1,577.00 (3)
Average per applicant	\$949.82	\$864.00	\$525.67
<b>Housing Outcomes</b>			
<b>Housed at time of decision</b>			
Yes	119	24	6
No	68	9	1

### Non-SOAR

This report provides information about non-SOAR-assisted applications (for individuals who are not experiencing or at-risk of homelessness or for which the *SOAR Critical Components* are not utilized).

## User Summary Report

- This report is available only to SOAR Leads. It displays information about all SOAR users that fall within the Leader's Agency, Cities/Counties, or State and is very helpful for exporting a user contact list.
- Once a User Summary Report has been generated, you can export the information to Excel.

SOAR Users

Export Report

Show10

Search Users

Created	Login	First	Last	Email	St	Role	Agency	Cases	Status
10/17/22	11/02/22	Nate	LLTestLive	nate5@nextstepdigital.com	YY	Local Lead	New Agency Test	0	Inactive
10/12/22	10/12/22	Nate	TestingReg	nate3@nextstepdigital.com	YY	Case Worker	Agency Two	0	Approved
10/07/22	10/07/22	Nate	TestLocalLead	natell@nextstepdigital.com	YY	Local Lead	Agency One	0	Approved
09/28/22	-	Nate	TestSept	nate2@nextstepdigital.com	YY	Case Worker	Agency Two	0	Approved
09/16/22	-	Mike	Kilpatrick	test4@nextstepdigital.com	YY	Case Worker	Agency One	0	Approved