

NC SOAR Onboarding and Certification

Last Updated August 2026



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NC SOAR Updates

- Register [here](#) for NCCEH's "White Flag Shelter" presentation in our monthly workshop series on the last Thursday of the month (Thur, August 27th) at 2pm
- SSA is currently making adjustments to their SOAR Liaison Contact List – stay tuned for that updated list
- NC SOAR Annual Conference Planning is underway
 - I will ask you to submit questions you have for SSA/DDS after this meeting. Please take some time and really reflect on your experiences processing cases this year and submit questions you'd like answered by both agencies.

NC SOAR Annual Info

SOAR Annual Location and Date:

Location:

Public Library Johnston County & Smithfield

305 E. Market St., Smithfield, NC 27577

Multipurpose Meeting Room

Date & Time:

Friday, Oct 16, 2026

10 AM - 3 PM

Currently Seeking Caterer – Catering Survey will be sent out in September

Will collect questions for SSA and DDS this month

Will create and agenda this month

Ideas? Activity Suggestions? Let me know!



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NC SOAR Onboarding

Let's take a deep dive!



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Congratulations!

You've Completed a SOAR Plus! Training Session



Congratulations on completing the SOAR Plus! Training Course!

You're now ready to take the next steps toward becoming an active NC SOAR Provider.



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Your NC SOAR Next Steps

Before submitting SOAR cases in North Carolina, there are a few important steps to complete:

1. Add your name to the **NC SOAR Provider List**
2. Complete the **NC-specific SOAR training**
3. Complete your **SSA Representative Registration**
4. Get access to the **NC SOAR Shared Drive**
5. Set up access to the **NC SOAR Outcome Reporting Tool**
6. Connect with your **County Lead and SOAR community**

Join the NC SOAR Provider List

Add your name to the NC SOAR Provider List

Please complete the provider registration quiz:

[NC SOAR Provider List Quiz](#)

Why this matters:

Your registration helps NC SOAR maintain an accurate statewide provider network and ensures you receive important communications.



Complete NC-Specific Training

North Carolina has an additional training requirement before you can submit SOAR cases.

Please:

- Watch **both NC SOAR process videos**
- Complete the **short quiz**
- Become familiar with North Carolina's specific SOAR process

Training Videos:

 [NC SOAR Video 1](#)

 [NC SOAR Video 2](#)

Get Your SSA Rep ID

SSA-1699 Representative Registration

SOAR Specialists must complete and submit **Form SSA-1699, Representative Registration**.

Important Steps:

- Download and complete the paper form (Fill out COMPLETELY or it will get denied)
- Register using Form SSA-1699 **before being designated as the Point of Contact (POC)** for your claimants.
- Keep your registration information available for your SOAR work.
- [SSA-1699 Form](#)

Need Help with SSA Registration?

Contact the Office of Central Operations (OCO)

 1-800-772-6270

For additional information about SSA-1699 registration:

[SSA-1699 Registration Information](#)

Tip: Complete your registration early so you're ready when you begin working with claimants.

Access the NC SOAR Shared Drive

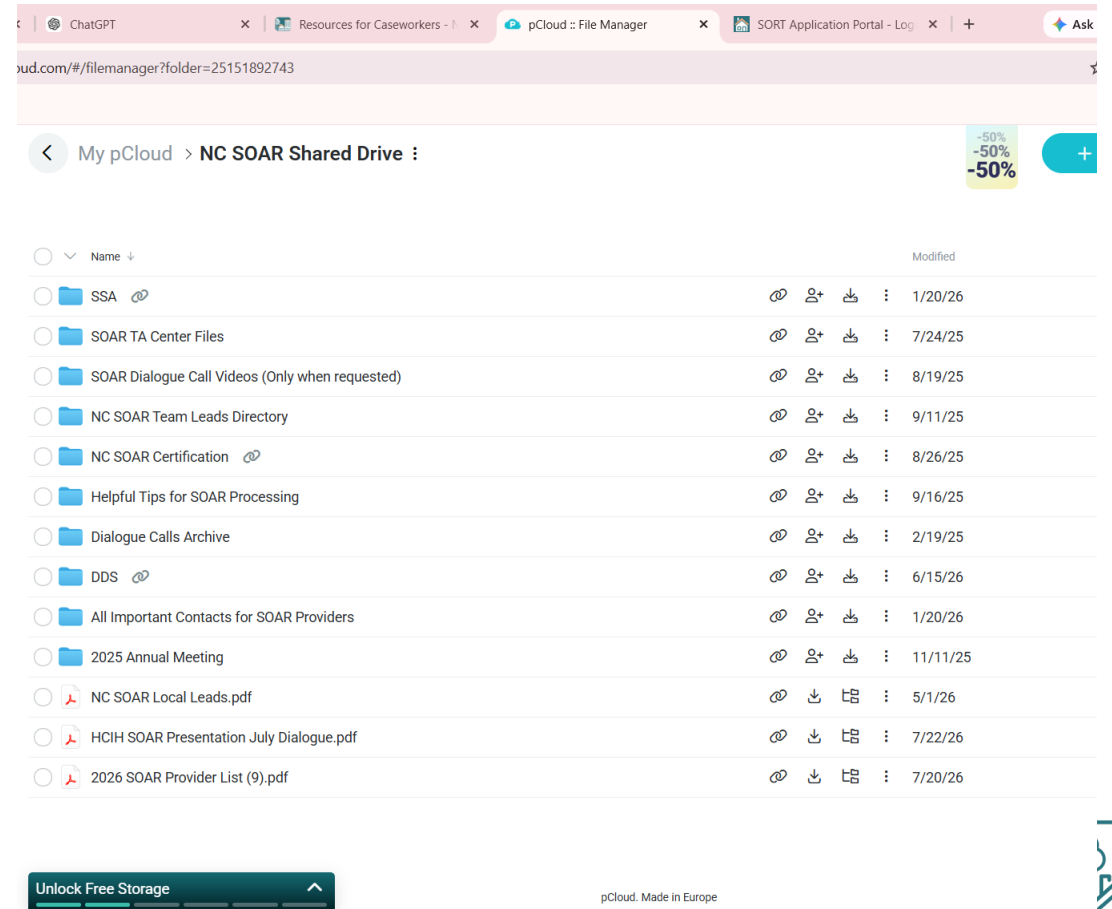
Your NC SOAR Resource Hub

NC SOAR Resources for Caseworkers

The Shared Drive contains essential resources, including:

-  SSA contact lists
-  DDS contact lists
-  SOAR resources and guidance
-  Important documents and tools

Tip: Make sure to familiarize yourself with the SSA and DDS contact lists – they change from time to time



The screenshot displays the pCloud File Manager interface for the 'NC SOAR Shared Drive'. The browser tabs at the top include 'ChatGPT', 'Resources for Caseworkers', 'pCloud :: File Manager', and 'SORT Application Portal - Log'. The address bar shows a pCloud file manager link. The interface features a navigation bar with 'My pCloud' and 'NC SOAR Shared Drive :'. A table lists the contents of the drive, including folders like 'SSA', 'SOAR TA Center Files', 'SOAR Dialogue Call Videos (Only when requested)', 'NC SOAR Team Leads Directory', 'NC SOAR Certification', 'Helpful Tips for SOAR Processing', 'Dialogue Calls Archive', 'DDS', 'All Important Contacts for SOAR Providers', and '2025 Annual Meeting', as well as PDF files like 'NC SOAR Local Leads.pdf', 'HCH SOAR Presentation July Dialogue.pdf', and '2026 SOAR Provider List (9).pdf'. Each entry shows icons for sharing, downloading, and deleting, along with a 'Modified' date. A 'Unlock Free Storage' button is visible at the bottom left, and the pCloud logo with 'Made in Europe' is at the bottom right.

Name	Modified
SSA	1/20/26
SOAR TA Center Files	7/24/25
SOAR Dialogue Call Videos (Only when requested)	8/19/25
NC SOAR Team Leads Directory	9/11/25
NC SOAR Certification	8/26/25
Helpful Tips for SOAR Processing	9/16/25
Dialogue Calls Archive	2/19/25
DDS	6/15/26
All Important Contacts for SOAR Providers	1/20/26
2025 Annual Meeting	11/11/25
NC SOAR Local Leads.pdf	5/1/26
HCH SOAR Presentation July Dialogue.pdf	7/22/26
2026 SOAR Provider List (9).pdf	7/20/26

Report Your NC SOAR Outcomes

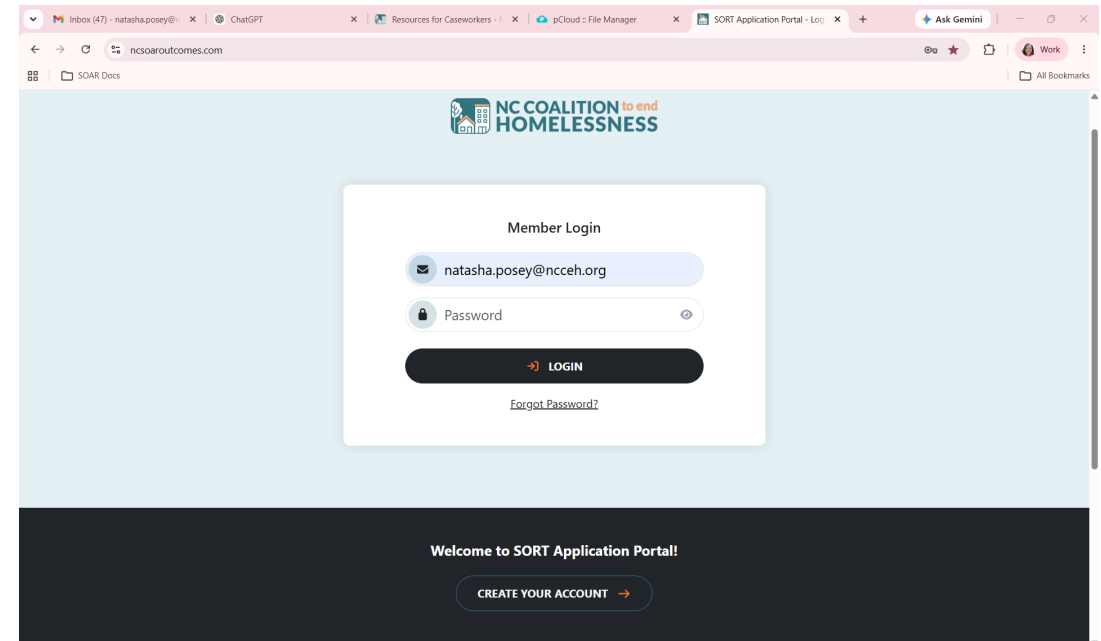
NC SOAR Outcome Reporting Tool

Please submit your outcomes monthly!

Why outcome reporting matters:

- Helps NCCEH maintain current statewide data
- Supports funding for SOAR programs
- Demonstrates the effectiveness and integrity of NC SOAR
- Helps us understand the impact of your work

★ Your outcomes tell the story of SOAR in North Carolina!



Connect With Your County Lead

Find Your NC SOAR County Lead

Your County Lead can help you:

- Stay informed about local SOAR activities
- Connect with your local SOAR workgroup
- Learn about SSA and DDS processes
- Stay updated on benefits-related events
- Build peer-to-peer support

NC SOAR County Lead List

No SOAR workgroup in your county?

👉 Consider becoming a **SOAR County Lead!**



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Stay Connected: Monthly SOAR Newsletter

Keep Up With NC SOAR

Make sure we have your **most up-to-date contact information** so you can receive the monthly SOAR Newsletter.

The newsletter includes:

- SSA updates
- DDS updates
- SOAR outcomes
- Upcoming meetings and events
- Important announcements

SOAR Superstar recognition 🎉

Know someone doing exceptional SOAR work?

Let us know so we can celebrate their success!



Join the Monthly SOAR Dialogue

SOAR Dialogue Meetings

These meetings are an opportunity to:

-  Share ideas and strategies
-  Learn from other providers
-  Problem-solve challenging cases and processes
-  Stay informed about SSA and DDS
-  Strengthen relationships across the NC SOAR community

Our goal:

Create a connected community where NC SOAR Providers can learn from and support one another.

Need Additional Support?

SOAR 1:1 Meetings

You don't have to navigate challenging cases alone.

Bi-monthly or as-needed 1:1 meetings are available for:

- Case conferencing
- Troubleshooting
- Questions about the SOAR process
- Additional support and guidance

Need help? Reach out!

We're here to support you as you begin your SOAR work.



Your NC SOAR Checklist

Before You Submit Your First SOAR Case

- ☐ Complete the NC SOAR Provider List quiz
- ☐ Watch both NC-specific SOAR videos
- ☐ Complete the NC SOAR quiz
- ☐ Submit your SSA-1699 registration
- ☐ Access the NC SOAR Shared Drive
- ☐ Review SSA and DDS contact lists
- ☐ Set up access to the Outcome Reporting Tool
- ☐ Identify your County Lead
- ☐ Join your local SOAR workgroup
- ☐ Make sure your contact information is current
- ☐ Attend monthly SOAR Dialogue meetings



Welcome the the NC SOAR Community!

Congratulations again! 🎉

You've completed the SOAR Plus! Training Course.

Now it's time to:

Connect. Learn. Collaborate. Advocate.

Together, we can help North Carolinians experiencing homelessness, serious mental illness, and other barriers access the disability benefits and supports they deserve.

Welcome to NC SOAR! 🌟



NC SOAR Caseworker Certification

Your Path to NC SOAR Certification

A two-stage process designed to build SOAR knowledge, skills, and experience.



**NC COALITION^{to}
HOMELESSNESS**

Certification at a Glance

Two Stages to Certification

STAGE 1:

Provisional Certification

Build your foundational SOAR skills and complete your first SOAR application.



STAGE 2:

Full NC SOAR Certification

Demonstrate continued experience and proficiency through additional applications, documentation, and evaluation.

Important Certification Information

Before You Begin:

To become an **NC SOAR Certified Caseworker**, you must successfully complete **both stages** of certification.

Application materials:

Materials submitted for review should come from **approved applications**.

The SOAR State Team Lead may consider **denied or pending applications on a case-by-case basis**.



Stage 1

NC SOAR Certified Caseworker — Provisional Status

Complete the following:

- ☐ **SOAR Plus! Training**
- ☐ **NC SOAR-specific quiz**
- ☐ **At least one SOAR application**
 - ☐ Use the Quality Review Checklist
- ☐ **One Medical Summary Report (MSR) OR SOAR FAST**
- ☐ **NC SOAR Caseworker Certification Exam**



Your First SOAR Application

Put Your Training Into Practice

Complete **at least one SOAR application** using the:

- ☐ Quality Review Checklist

Important:

Newly trained caseworkers must begin their first SOAR application **within three months of completing training.**

Documentation needed:



Completed Quality Review Checklist



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Medical Documentation

Demonstrate Your SOAR Documentation Skills

Submit **one** of the following:

☐ Medical Summary Report

OR

☐ SOAR FAST

When submitting a Medical Summary Report:

Remove/withhold identifying information

The goal is to demonstrate your ability to develop effective SOAR documentation.

Certification Exam

Complete the NC SOAR Caseworker Exam

The exam demonstrates your understanding of:

- SOAR principles
- The NC SOAR process
- SOAR caseworker responsibilities
- Effective SOAR practice

 **Documentation needed:**
Online NC SOAR Caseworker Exam

Completing Stage 1

 **Stage 1 Complete!**

Once you have completed all Stage 1 requirements:

You are ready to take the next steps toward full NC SOAR Caseworker Certification.

Build Your Experience

Demonstrate Continued SOAR Practice

Complete:

- **Two additional SOAR applications**
- Submit **MSRs or FASTs** for review
- Complete the **NC SOAR Self-Assessment & Evaluation**
- Complete the **NC SOAR Caseworker Exam**

Additional Applications

Complete Two More SOAR Applications

For each application:



Complete a Quality Review Checklist



Complete a Medical Summary Report **or** SOAR FAST



Submit required documentation to the **NCCEH SOAR State Lead** for review.

Remember:

Identifying information must be withheld from submitted reports.



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Stage 2: Self-Assessment and Evaluation

Reflect on Your SOAR Practice

Complete the:

NC SOAR Caseworker Self-Assessment & Evaluation

The assessment evaluates your:

- SOAR values
- Skills
- Experience
- Growth as a SOAR caseworker

 **Documentation needed:**
Online assessment/evaluation

NC SOAR Caseworker Exam

Complete the NC SOAR Caseworker Exam

Complete the required **NC SOAR Caseworker Exam** as part of Stage 2.

This provides an opportunity to demonstrate your knowledge and understanding as you progress toward full certification.

Certification Review Process

What Happens After You Submit?

1. Submit your materials

Complete the requirements for the appropriate certification stage.



2. NCCEH reviews your materials

The SOAR State Team Lead evaluates your submitted documentation.



3. Receive notification

NCCEH will notify you of your certification status.



4. Become NC SOAR Certified 🎉

You will receive documentation confirming your certification.



5. Join the State List

You will be added to the statewide list of certified SOAR caseworkers.

Certification Requirements at a Glance

Requirement:

SOAR Plus! Training + NC SOAR quiz

First SOAR application

Medical Summary Report

NC SOAR Caseworker Exam

Two additional applications

Additional MSRs/FASTs

Self-Assessment & Evaluation

Documentation:

None needed

Quality Review Checklist

Copy with identifying information withheld

Online exam

2 Quality Review Checklists

Copies with identifying information withheld

Online assessment/evaluation



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Maintaining Your Certification

Certification Is an Ongoing Commitment

To maintain **NC SOAR Caseworker Certification**, you must:



Submit outcome forms

Complete and submit SOAR outcomes as required.



Complete an annual self-assessment

Complete the annual SOAR Self-Assessment and Evaluation.



Participate in monthly SOAR Dialogue Calls

Stay connected, share experiences, and continue learning.



Participate in community workgroup meetings

Build relationships and strengthen the NC SOAR community.



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Your Certification Roadmap

Your Path to NC SOAR Certification

SOAR Plus! Training
↓
NC SOAR-Specific Quiz
↓
First SOAR Application + Quality Review
↓
MSR or FAST
↓
Caseworker Exam
↓

STAGE 1: Provisional Status

↓
2 Additional SOAR Applications
↓
MSRs/FASTs Submitted for Review
↓
Self-Assessment & Evaluation
↓
Caseworker Exam
↓

🎉 NC SOAR Certified Caseworker

Next Meeting:

Tuesday, September 15th at 10am

NC SOAR Community Certification



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Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc_end_homelessness 

Contact us re: SOAR

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