

SOAR Data and Trends

July 2024



NC COALITION to
HOMELESSNESS end

The Importance of Data: Why Track SOAR Data?

- Measuring impact
- Funding & support
- Continuous improvement
- Accountability & transparency
- Strategic planning



OAT Overview

Track those outcomes!



Online Application Tracking (OAT) FAQs

- OAT is for tracking the outcomes (i.e., decisions) of SOAR-assisted SSI/SSDI applications.
- You must pass the SOAR Online Course before registering for OAT as a Case Worker.
 - SOAR Leaders (State/Local/Agency) can register as a "Supervisor-Only" to bypass the training requirement.
- The system does not communicate with SSA, DDS, HMIS, or other outside systems.



Data in OAT

- Outcomes for initial applications and appeals
 - Approval rates
 - Time to decision
 - Critical components
- Demographics
 - Age
 - Gender
 - Race
 - Ethnicity
 - Veteran
 - Legal system
- Optional outcomes
 - Housing
 - Employment
 - Medicaid and other public benefit reimbursements



Roles in OAT

- State Team Lead
 - Directs the SOAR initiative at the state level; has access to data from all agencies in the state.
- Local Lead
 - Oversees multiple agencies in a community, county or region; has access to data from multiple agencies in the specified service area.
- Agency Lead
 - Oversees multiple case workers in an agency; has access to data from all caseworkers in that agency.
- Case Worker
 - Works with applicants and enters data into OAT on his/her application outcomes. Has access to their data only.

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OAT Case Worker Dashboard



Logout

Dashboard Applications Reports Help

Hi, Sarah Smith (Case Worker)

Dashboard

Sarah Smith (Case Worker) | **Stats** | **Created** | **Email** | **ID**
 Agency One • Test City • YY | 358 Apps | 05/14/2015 | ssmith_cw@agencyone.com | 12100

My Initial Outcomes

Approvals **75%**
 ● 174 Approved

Denials **25%**
 ● 58 Denied

Decisions **233**
 Total Initial

Days **67**
 AVG Days

Approvals

YY Approvals **85%**
 ● 100 Total

National **65%**
 ● 79034 Total

New Applicants

Create Applicant

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

Snapshots & Summaries

Monthly Snapshot (September 2022)

9 NEW APPS

Initial | **ALJ**
 7 Total

4 APPROVED APPS

Initial | **ALJ**
 4 Total

Top CWs last Quarter (Initials)

Sarah Smith
2 Approvals
 100% of 2 Total Decisions

Top CWs last Quarter (Appeals)

Reconsideration
 Sarah Smith | **1 Approvals**
 50% of 2 Total Decisions

ALJ Hearing
 No Results

Pending Applications | **All Applications**

Application Type

Show All

Show 10

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
aa11ss1234	Reconsideration using SOAR	Archived	-	0	Continue
aa12bb1234	Initial SOAR Application	Approved	0	1	Actions
aa34bb3456	Initial SOAR Application	Approved	11	1	Actions
aa34tt5678	Initial SOAR Application	Approved	8	1	Actions
aa57rd1967	ALJ Hearing using SOAR	Approved	25	2	Actions
aa82ba1234	Reconsideration using SOAR	Approved	0	1	Continue
aa85bb1234	Initial SOAR Application	Approved	246	1	Actions



Applicant Identification (ID)

- No personally identifiable information

- Alpha-numeric ID

- 2 letters
- 2 numbers
- 2 letters
- 4 numbers

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- Example: AA11BB2222

- Case workers should record Applicant ID in the case file for cross reference!

New Applicants

Applicant ID Create Applicant

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



Applicant Overview

te98st1000

Created on 09/27/2022 by [Sarah Smith](#) | Updated on 09/27/2022 by [Sarah Smith](#)

Application Overview

📍 Test City, YY

● **Initial SOAR Application - Approved**

1 Total Decision(s)

Age: 24

Military: No

Working? No

→] **Sex:** Female

Assistance: Medicaid

Housing Status: Institution (psychiatric or other hospital, nursing home, etc.)

CASE WORKER

Smith, Sarah

Agency One

Results

Initial SOAR Current

Approved on September 14, 2022

Approved for:

SSI Only

Monthly SSI:

\$1,000.00

Is applicant working post-decision?

Yes

Was applicant housed at decision?

No

Representative Payee Needed?

No

Protective Filing Date:	09/08/2022
Application Date:	09/12/2022
Completed SSA 1696?	No
Medical Records Collected?	Yes
MSR	Yes
MSR Co-Signed?	Yes

Applicant Created

GENDER	AGE	CASE WORKER
F	24	Smith, Sarah
N/A		

Initial SOAR Application - Details

APP DATE	SSA 1696?	MSR?
09/12/22	No	Yes

MEDICAL RECORDS	QUALITY REVIEW
Yes	Yes

September 8, 2022

Initial SOAR Application - Decision

STATUS	DECISION DATE	DAYS DECISION
Approved	09/14/22	2

September 14, 2022

Initial SOAR Application - Post Approval

Summary Report:

Dashboard Applications Reports Help Hi, Sarah Smith (Case Worker)

Summary Reports

Report Type
 Overview (default) Optional Information Non-SOAR

Veteran: Show All
 Age: Show All
 Living Situation: Select All, Outdoors (e.g., street, abandoned Shelter, Transitional, Own or someone else's apartment, SRO, boarding house, Residential treatment for adults
 Filter by Date of Decision: 01/01/2000 - 09/30/2022
 Training Type: Show All
 Funding Type: Show All

Filter Reset

Filtered Results

Export CSV Export PDF

Overview

	Initial	Recon	ALJ
Approvals	174	30	12
Denials	58	17	8
Total Decisions	232	47	20
Approval Rate (%)	75%	64%	60%
Avg Days to Decision	71	58	175



Using OAT as a Management Tool

- Run reports as a State, Local, or Agency Lead to look at:
 - Approval rates
 - Use of SOAR Critical Components
 - Number of applications from each case manager
- Use outcomes to identify opportunities for targeted TA

Resources and Guides

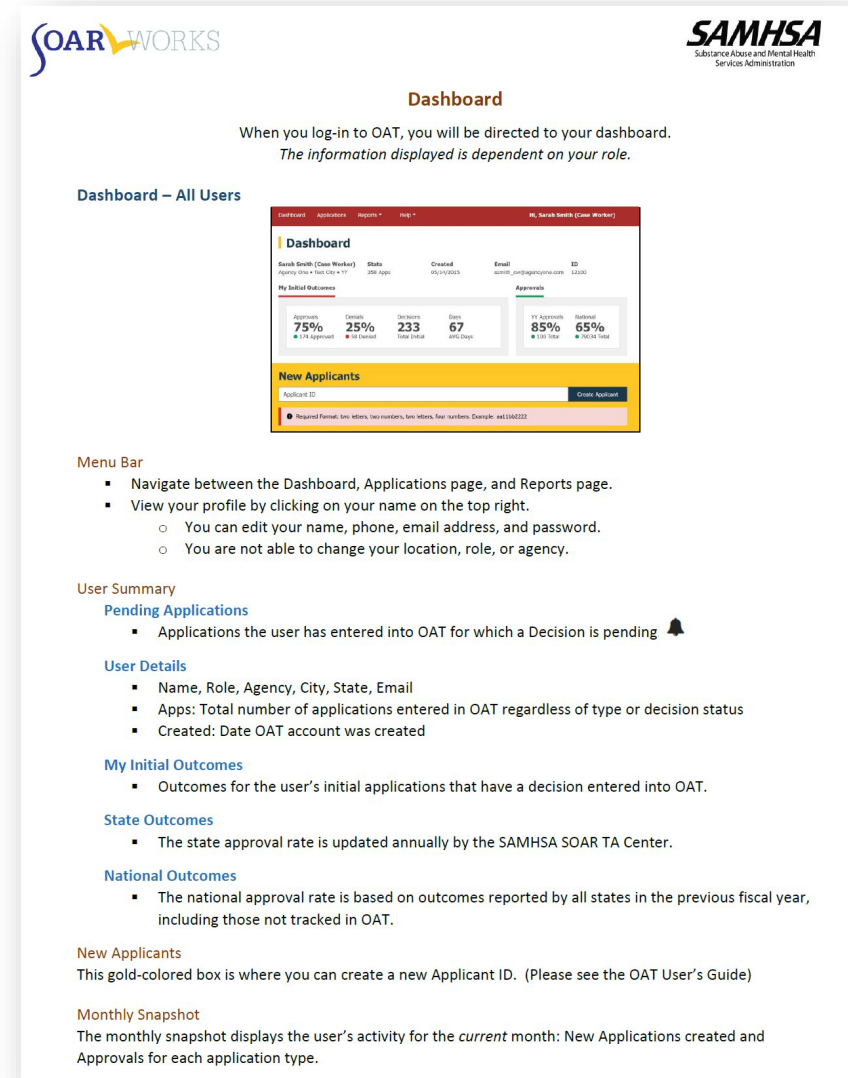
"Help" Tab in OAT:

- SOAR OAT User Guide
- SOAR OAT Reports Guide
- Support: soaroat@prainc.com

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Dashboard Navigation And Reports Guide



The screenshot shows the SOAR OAT Dashboard for a user named Sarah Smith. The dashboard includes a menu bar with options for Dashboard, Applications, Reports, and Help. A user summary section displays 'Pending Applications' with a notification bell icon. Below this, 'User Details' lists personal and account information. 'My Initial Outcomes' shows a table of application statuses. 'State Outcomes' and 'National Outcomes' provide approval rate statistics. A 'New Applicants' section contains a form to create a new applicant ID. A 'Monthly Snapshot' section explains the data shown for the current month.

SOAR WORKS

SAMHSA
Substance Abuse and Mental Health
Services Administration

Dashboard

When you log-in to OAT, you will be directed to your dashboard.
The information displayed is dependent on your role.

Dashboard – All Users

Approvals	Denials	Outcomes	Apps	Y1 Approvals	National
75%	25%	233	67	85%	65%

New Applicants

Applicant ID:

Menu Bar

- Navigate between the Dashboard, Applications page, and Reports page.
- View your profile by clicking on your name on the top right.
 - You can edit your name, phone, email address, and password.
 - You are not able to change your location, role, or agency.

User Summary

Pending Applications

- Applications the user has entered into OAT for which a Decision is pending

User Details

- Name, Role, Agency, City, State, Email
- Apps: Total number of applications entered in OAT regardless of type or decision status
- Created: Date OAT account was created

My Initial Outcomes

- Outcomes for the user's initial applications that have a decision entered into OAT.

State Outcomes

- The state approval rate is updated annually by the SAMHSA SOAR TA Center.

National Outcomes

- The national approval rate is based on outcomes reported by all states in the previous fiscal year, including those not tracked in OAT.

New Applicants

This gold-colored box is where you can create a new Applicant ID. (Please see the OAT User's Guide)

Monthly Snapshot

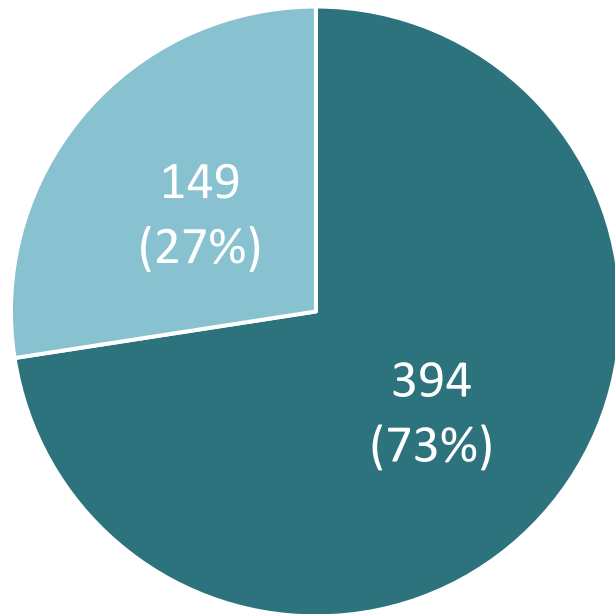
The monthly snapshot displays the user's activity for the *current* month: New Applications created and Approvals for each application type.



NCCEH

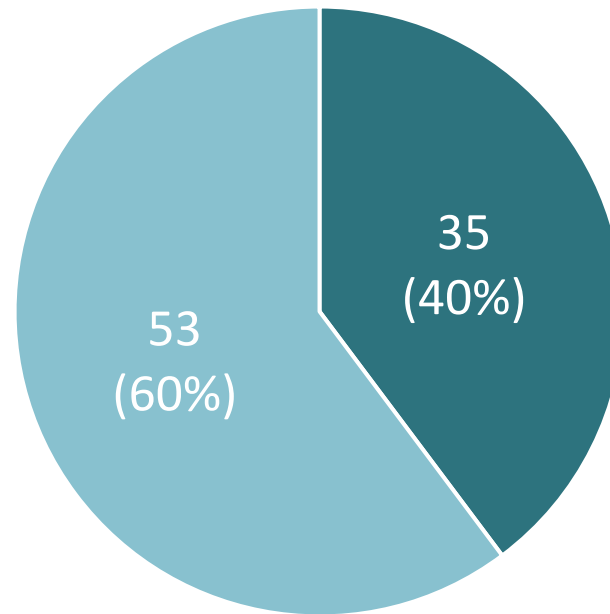
SOAR in NC: OAT Outcomes Data

Initial Applications



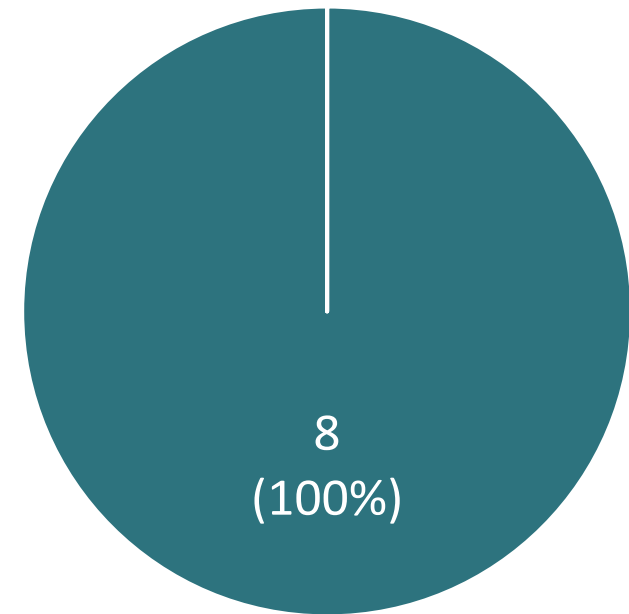
■ Approvals ■ Denials

Reconsiderations



■ Approvals ■ Denials

ALJ



■ Approvals ■ Denials

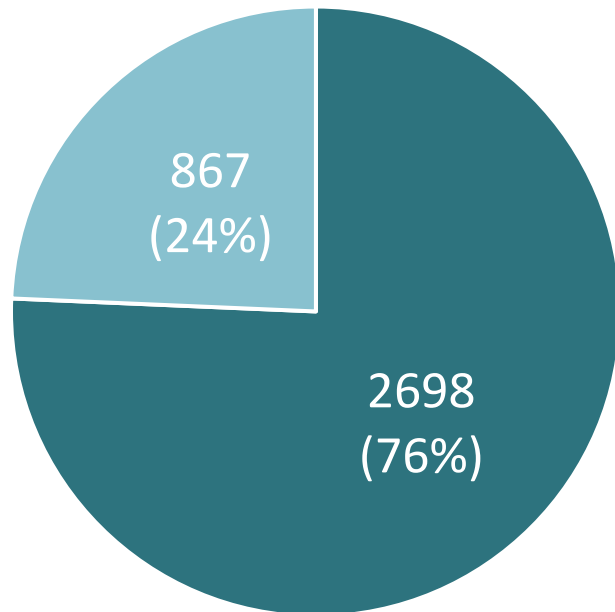
(11/17/08 – 7/16/24)



NCCEH

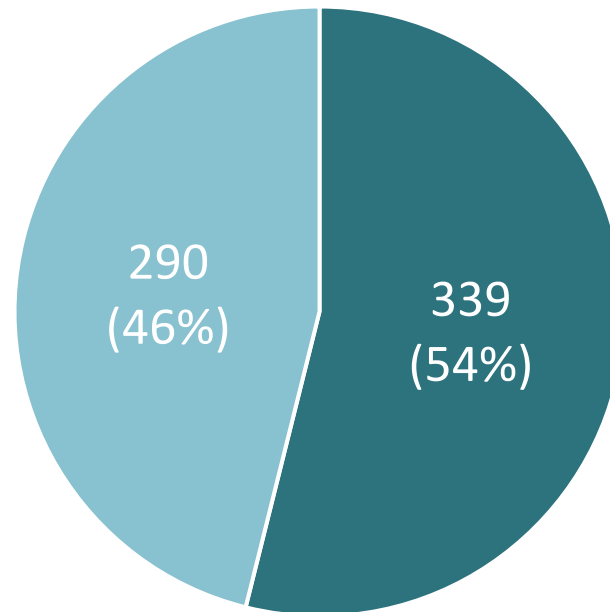
SOAR in NC: Cumulative Outcomes Data

Initial Applications



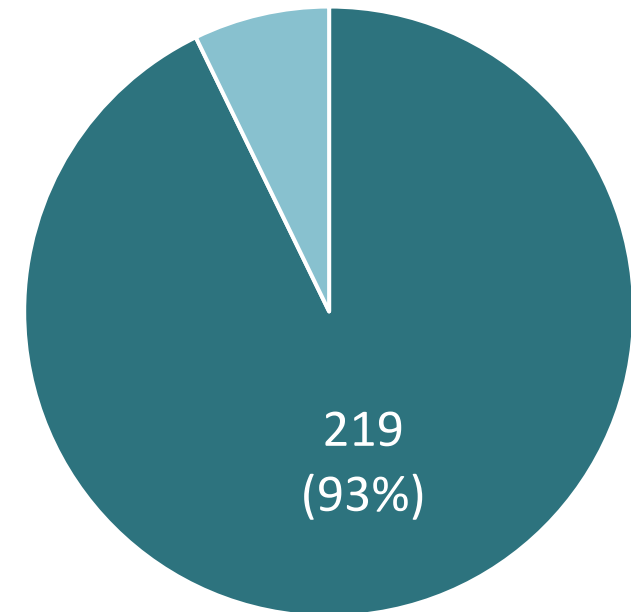
■ Approvals ■ Denials

Reconsiderations



■ Approvals ■ Denials

ALJ



■ Approvals ■ Denials

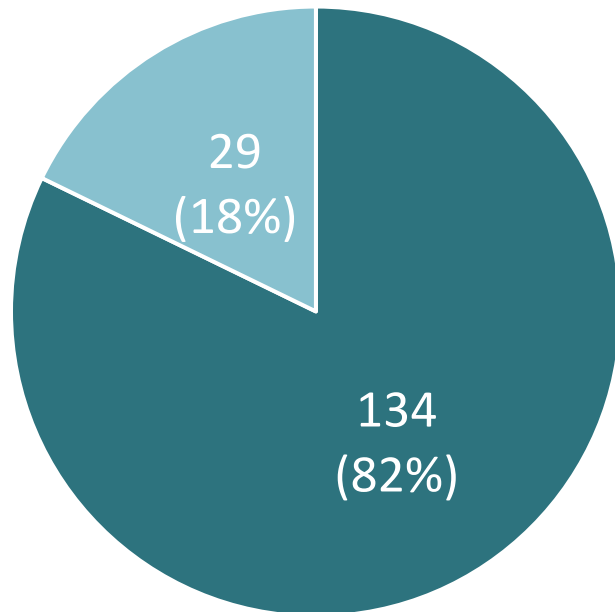
(11/17/08 – 6/13/24)



NCCEH

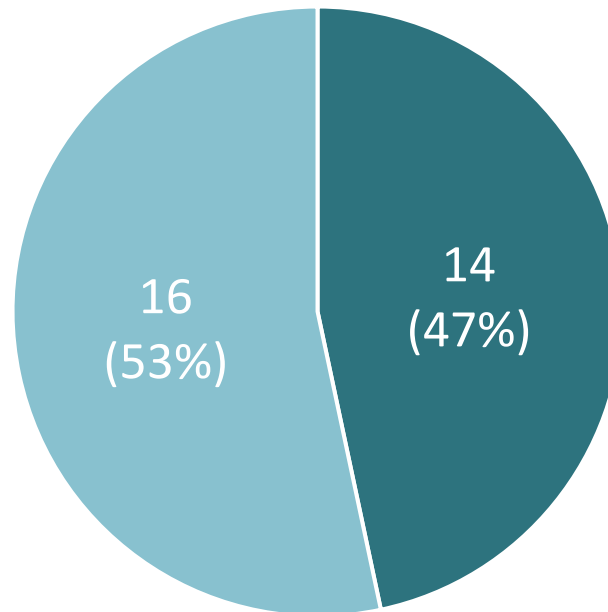
SOAR in NC: FY23-24 Data

Initial Applications



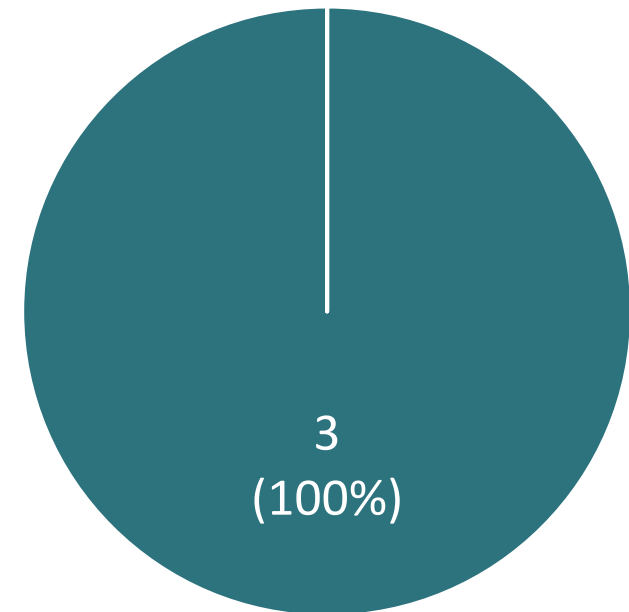
■ Approvals ■ Denials

Reconsiderations



■ Approvals ■ Denials

ALJ



■ Approvals ■ Denials

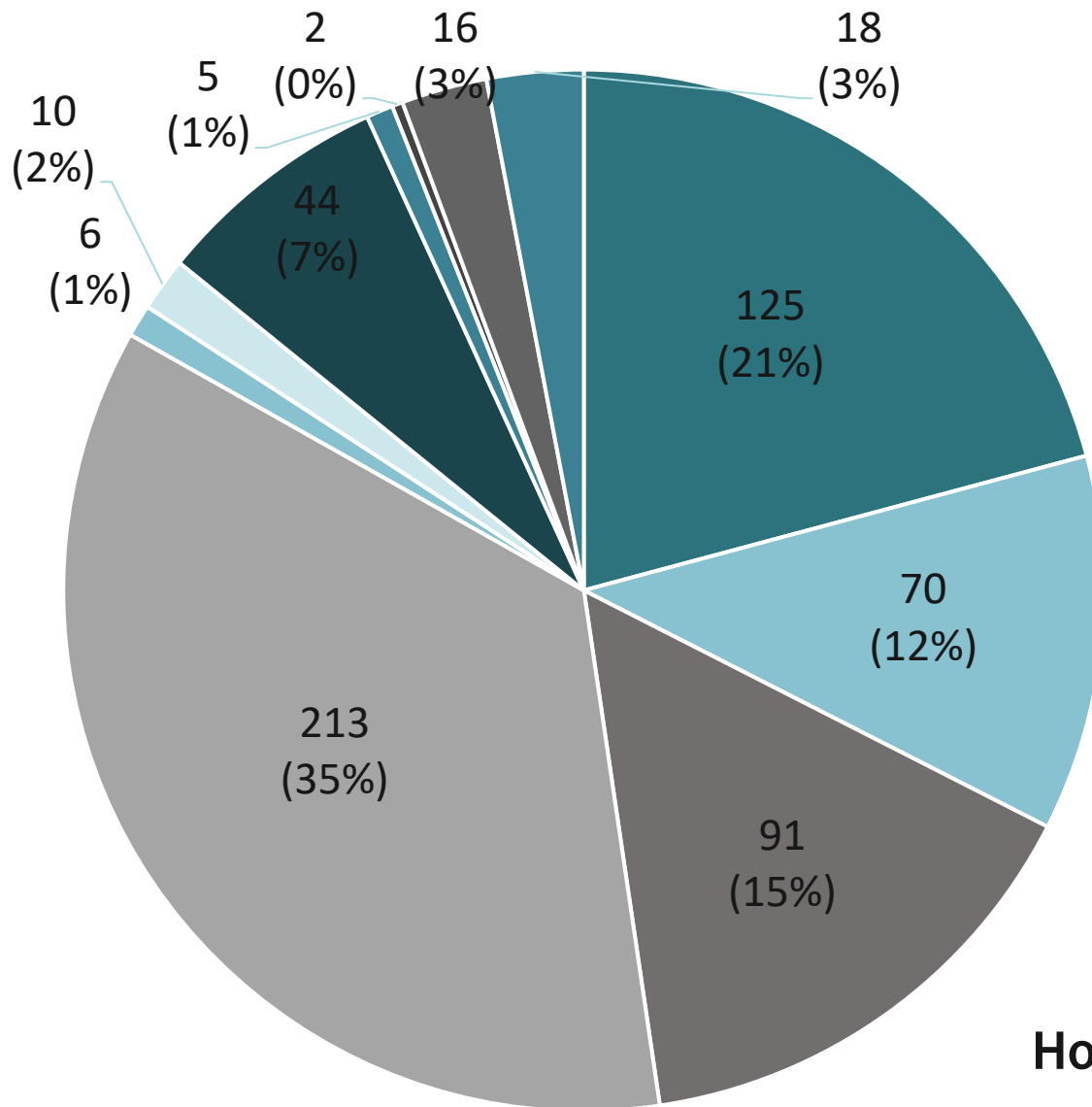
(7/1/23 – 6/30/24)



NCCEH

SOAR in NC: Housing Data

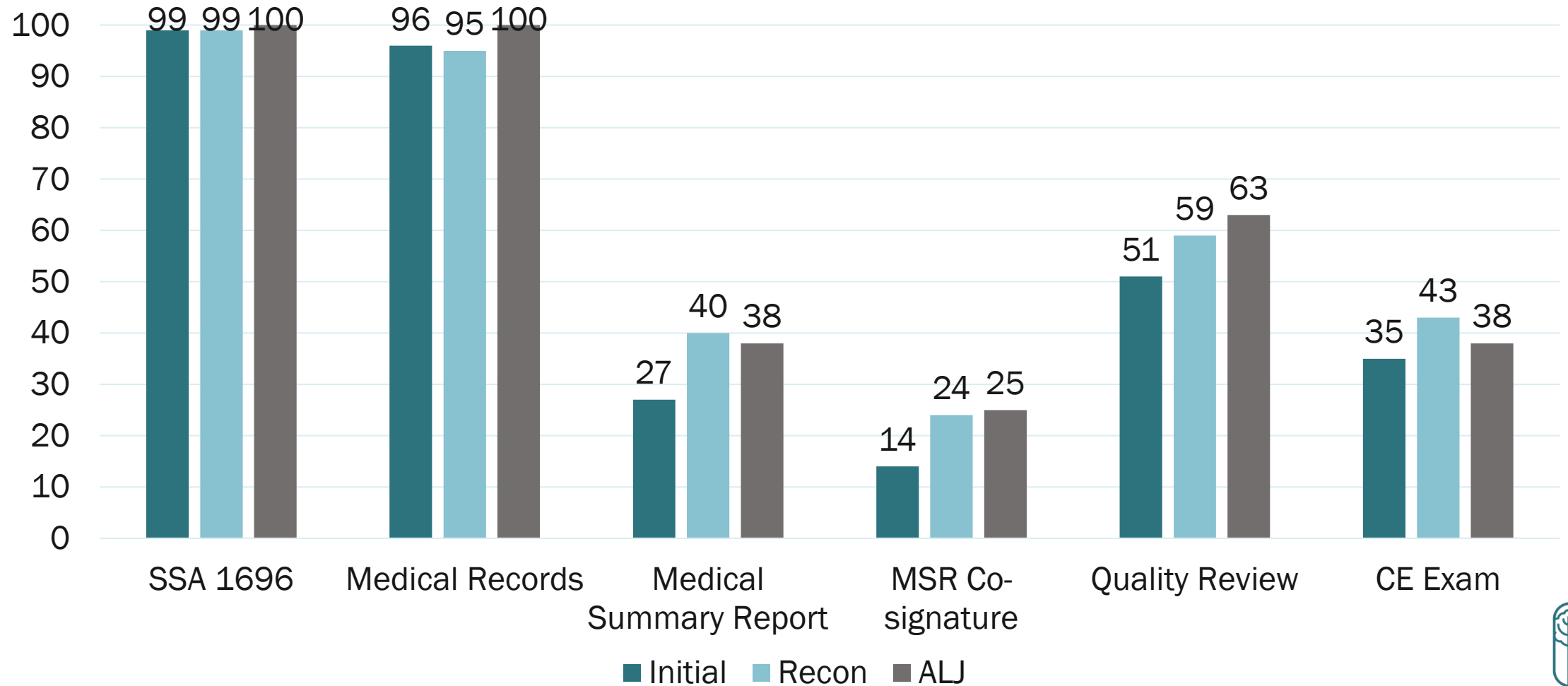
- Outdoors
- Shelter
- Transitional
- Own, room, house
- SRO, boarding house
- Residential treatment for adults
- Institution
- Jail or correctional facility



Housing Status



SOAR in NC: Critical Components



Debrief

- What are the gaps in our data?
- What might be causing the low MSR rate?
- How are you reporting outcomes to your agency?



Next Steps

- Register for OAT.
- Review the SOAR OAT User and Reports Guide.
- Submit any outstanding SOAR-assisted SSI/SSDI application outcomes!
- Continuously log new outcomes
- Expect email reminders from me throughout the summer 😊



OAT Walk Through

- Entering a new applicant
- Running a report



Welcome to SOAR (SSI/SSDI Outreach, Access, and Recovery) Online Application Tracking (OAT)

OAT allows SOAR-trained case managers to enter outcomes of their SOAR-assisted SSA disability applications.

OAT is NOT affiliated in any way with SSA and cannot provide information about application status.

For more information about OAT, please contact soaroot@prainc.com.

For more information about SOAR, please visit the SOAR [website](#).

For access to the SOAR Online Course, please visit SOAR [Online Training](#).

Guides

[SOAR OAT User Guide](#)

[SOAR OAT Report Guide](#)

[SOAR OAT Data Form](#)

OMB Number: 0930-0329, Expiration: 4/30/2023

Log in

Access your account.

Email

Password

Login

[Forgot password?](#)



NCCEH