

NC SOAR Onboarding Guide

November 2024



NC COALITION to
HOMELESSNESS end

Updates from SSA

- Ensure you have enrolled as an Individual Representative via the [SSA-1699](https://www.ssa.gov/1699)
 - SSA is working to find OHO contact information for SOAR providers
 - If you have issues call 1-800-772-6270
- Social Security benefits and Supplemental Security Income (SSI) payments will increase 2.5% in 2025.
 - On average, Social Security retirement benefits will increase by about \$50 per month starting in January.
- [Starting January 6, 2025](#), Social Security offices will require appointments for most in-person services, including Social Security card requests; walk-ins will still be accepted for vulnerable populations and urgent needs.



Updates from NCCEH

- Be on the lookout for annual provider survey
 - Mandatory for all providers
- 2nd annual [NCCEH Homelessness No More Gala](#) on Friday, December 21st
- New SOAR onboarding process!

NC SOAR Onboarding Guide – Context

- In April 2023, the SAMHSA SOAR TA Center developed the [SOAR Onboarding Guide](#)
- Designed to support SOAR providers as they get acquainted with their new role
- Beginning in July, the NC SOAR Advisory Board worked to customize the SOAR Onboarding Guide to be specifically tailored to the North Carolina SOAR process
- This is part of a broader effort to streamline the onboarding process for SOAR providers, making their roles easier, reducing turnover, and building a more supportive work environment.



The Old NC SOAR Onboarding Process

- Established once the SOAR Online Course became the standardized form of training
- Once someone passes the SOAR Online Course, an email from SOAR National is sent to them and the NC SOAR State Team Lead (STL)
- The NC STL then emails them a link to the NC-specific SOAR quiz, which is an additional requirement to be SOAR trained in North Carolina
- Once the person passes the quiz (must receive at least a 12/16), they are officially SOAR trained

The Old NC SOAR Onboarding Process – cont.

- The NC STL then emails the person with all the resources they need to begin their work:

I wanted to share a number of resources that you may find helpful as you begin and please remember that you can always contact us:

SOAR RESOURCES ON NCCEH WEBSITE: We have a number of resources on the NCCEH website for **SOAR** Case Workers, including:

SOAR SECURE WEBPAGE: We have a secure webpage for our **SOAR** providers with important contact information and other resources. Please access the page. Here are your credentials:

Username: dtousley

Password: Changeme123

Change your password here: <https://www.ncceh.org/accounts/password/reset/>

DDS SOAR EXAMINERS: Please remember to let Angela Herron know when you have filed a **SOAR** application by faxing her the full number is (833) 441-1045 and her phone number is 919-814-2746 or 1-800-443-9360 x 2746.

You will then call the DDS Disability Call Center for updates on the status of the claim and the name of the assigned examiner: 866-541-2222. Please do not call your examiner for case status updates; questions on the status of your case should be directed to the Call Center.

The **SOAR** DDS Examiners are:

Cheri McClellan 919.814.2929

Patrilla Williams 919.814.2851

Tonya Jordan 919.814.2896

Nick Esposito 919.814.2707

Jennifer Thompson 919.814.2942

Andrea Cowart 919.814.3121

Shawn McLeod 919.814.30611

Their fax number is 866-542-8053.

MONTHLY SOAR DIALOGUE PHONE CALLS: **SOAR** Caseworkers across the state call in on the third Tuesday of every month from here: <https://www.ncceh.org/events/monthly/>

OUTCOME REPORTING: You can follow this link to register for the OAT online outcome reporting database: <https://soartrack.samhs.gov/>

Remember, we are only as good as our numbers reflect, and we need your data to be able to advocate for more resources and system changes.

SOAR CERTIFICATION: You have taken the first step to become a **SOAR** Certified Case Worker. Please follow this link to see what it takes to become certified: <https://www.ncceh.org/certification/>

TRAINING POWERPOINTS ATTACHED: I have attached the PPTs from the NC specific videos so that you can review them anytime.

Please let us know if you have any questions about these resources or the **SOAR** project in North Carolina.

- After about a month, the NC STL emails the new caseworker to check-in and offers to schedule a check-in call



The New NC SOAR Onboarding Process

- First 3 steps remain the same:
 - Once someone passes the SOAR Online Course, an email from SOAR National is sent to them and the NC SOAR STL
 - The NC STL then emails them a link to the NC-specific SOAR quiz
 - Once the person passes the quiz, they are officially SOAR trained
- Once person passes the quiz, NC STL emails them the NC SOAR Onboarding Guide (which the person should save to their computer)
- The NC STL will schedule a check-in call within 1 month of the person's training date
 - At the check-in call the NC STL and new provider will review the NC Onboarding Guide and discuss any questions/concerns.



How will this help NC SOAR?

- **Clearer Guidance:** A new onboarding guide provides step-by-step instructions, reducing confusion and ensuring providers feel well-prepared from the start.
- **Early Support:** A scheduled check-in call within one month of training allows new providers to address any challenges, ask questions, and feel supported early in their roles.
- **Job Satisfaction:** By providing structured support and resources, new providers can transition more smoothly, which helps reduce stress, increase confidence, and ultimately decrease turnover.
- **Consistent Quality of Service:** A streamlined onboarding ensures all SOAR providers are well-equipped, leading to a more consistent, high-quality experience for clients.

Reviewing NC SOAR Onboarding Guide

- I want your feedback!
- <https://docs.google.com/document/d/11HXb7-I2TrFJ3WLUn5SHEWirMOulyQ8B/edit?usp=sharing&oid=105389058137162832751&rtpof=true&sd=true>