



### **NC SOAR Community Implementation Strategies for Success**

The intent of NC SOAR is to access SSI/SSDI benefits for people experiencing or at-risk of homelessness who are living with disabilities. Caseworkers across the state have been trained to use SOAR methodology to increase approval ratings and decrease waiting times on initial SSI/SSDI applications, and are applying these techniques in their work with clients. We have changed the way that caseworkers in North Carolina assist their clients with disability applications; now we need to change community systems to support the work of SOAR.

To do this, NC SOAR comprises critical components that communities need to implement to bring about the systems change needed. The greater the number of critical components, the more successful the community effort.

Communities can achieve three levels of implementation completion:

- Bronze (the first level)
- Silver (the second level)
- Gold (the highest level)

Communities seeking certification should contact NCCEH for a consultation to determine their initial community level rating. Once a particular level has been achieved, communities will receive a SOAR certificate recognizing the level of accomplishment. At each level achieved, a new certificate will be issued. To remain certified at any level, communities must submit an annual SOAR report to NCCEH that includes all documentation needed for each task at the corresponding level.

For technical assistance, please contact the SOAR State Team Lead at 919-755-4393, extension 5030 or at [soar@ncceh.org](mailto:soar@ncceh.org).

**Each component of a bronze, silver or gold community (see next page) is associated with one of the following critical component categories:**

1. Staffing, Submission and Processing of Applications (STF)
2. Collaboration (COL)
3. Training and Follow up (TRN)
4. Quality Review, Tracking Outcomes and Sustainability (QR)
5. Leadership and Planning (LDR)

*Items in bold are considered threshold: your community must have these things in place to be considered a Bronze, Silver, or Gold NC SOAR Community. Before being considered for the succeeding NC SOAR Community level, all previous level criteria (bolded and non-bolded items) must be met.*

## **Bronze Level Community**

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- Compile list of caseworkers currently implementing the SOAR process for SSI/SSDI applications. (STF)**
  - Train caseworkers from local agencies who will use SOAR methodology and do SSI/SSDI applications. (TRN)**
  - Submit all community outcomes for individual SOAR cases in the [Online Application Tracking \(OAT\)](#) system. (QR)**
  - Complete initial review of community outcomes to identify and work on areas/issues of concern. (QR)**
  - Designate SOAR Implementation Lead/Team. (LDR)**
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- Develop community referral process to send those in need of benefits to certified SOAR caseworkers to determine eligibility for SOAR. (STF)
  - Obtain commitment from local agencies to have staff obtain and implement SOAR training (documented with signed MOUs). (COL)
  - Hold preliminary meeting with hospitals to coordinate obtaining medical information and to discuss potential funding opportunities. (COL)
  - Host SOAR Essentials training to inform providers about SOAR. (TRN)

**Bronze Documentation Required (please submit to NCCEH via email at [soar@ncceh.org](mailto:soar@ncceh.org))**

Task	Documentation
<b>Compile list of caseworkers currently implementing SOAR</b>	<b>List of caseworkers submitted to NCCEH</b>
<b>Train caseworkers from local agencies who will use SOAR in completing SSI/SSDI applications</b>	<b>Training dates, locations (cities) submitted to NCCEH</b>
<b>Submit all community outcomes</b>	<b>Community outcomes report via OAT submitted to NCCEH</b>
<b>Complete initial review of community outcomes to identify/work on areas of concern</b>	<b>Initial review held with NCCEH staff present (via conference call)</b>
<b>Designate SOAR Implementation Lead/Team</b>	<b>Contact information of lead/team submitted to NCCEH</b>

Develop community referral process	Copy of community referral process/protocol submitted to NCCEH
Obtain commitment from local agencies whose staff will obtain and implement SOAR training	Copies of signed MOUs submitted to NCCEH
Hold preliminary meeting with area hospitals	Date and attendance roster of meeting submitted to NCCEH
Hold SOAR Essentials training	NCCEH will have training date/location on record

## **Silver Level Community**

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- All Bronze level criteria met
  - Community has a dedicated, NC SOAR Certified staff person who assists with applications and acts as the SSI/SSDI expert for the community (STF)
  - Contact and begin partnership with local SSA office(s) about SOAR process (COL)
  - Establish process for ongoing review and tracking of community outcomes (QR)
  - Conduct annual evaluation of SOAR Implementation based on gathered outcomes and feedback (QR)
  - Establish process/schedule for regular communication between SOAR agencies and/or caseworkers (LDR)
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- Secure funding to obtain medical records, if payment required (STF)
  - Community caseworker(s) are encouraged to obtain NC SOAR Caseworker Certification (STF)
  - Obtain support and commitment of participation from local medical providers to conduct assessments and needed evaluations, funding support or medical records support (document with signed MOUs) (COL)
  - Hold Documenting Disabilities training for medical professionals (TRN)
  - Hold at least four local SOAR community planning meetings per year (LDR)

**Silver Documentation Required (please submit to NCCEH via email at [soar@ncceh.org](mailto:soar@ncceh.org))**

<b>Task</b>	<b>Documentation</b>
<b>Community has a dedicated, NC SOAR Certified staff person who assists with applications and acts as the SSI/SSDI expert for the community</b>	<b>Job description, name, title and contact information of dedicated SOAR staff submitted to NCCEH</b>
<b>Contact and begin partnership with local SSA office(s) about SOAR process</b>	<b>Meeting date(s) and notes submitted to NCCEH</b>

<b>Establish process for ongoing review and tracking of community outcomes</b>	<b>Description of process submitted to NCCEH</b>
<b>Conduct annual evaluation of implementation based on gathered outcomes and feedback</b>	<b>Date, location, notes from annual evaluation submitted to NCCEH</b>
<b>Establish process/schedule for regular communication between SOAR agencies and/or caseworkers</b>	<b>Description of process submitted to NCCEH</b>
Secure funding to obtain medical records, if payment required	Funding source identified to NCCEH
Community caseworker(s) are encouraged to obtain NC SOAR Caseworker Certification	Copy of email(s) or other communication to caseworkers re: NC SOAR Caseworker Certification
Obtain commitment of participation from local providers to conduct assessments and needed evaluations, provide funding (can be in-kind), and provide medical records support	Copies of signed MOUs submitted to NCCEH
Hold Documenting Disabilities training	NCCEH will have training date/location on record
Hold at least four local SOAR community planning meetings per year	Dates and notes from community planning meetings submitted to NCCEH

## **Gold Level Community**

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- All Bronze and Silver level criteria met**
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- Hire SOAR Certified dedicated team (at least two full-time workers) (STF)
  - SOAR team maintains community contact and accepts community referrals for applications (STF)
  - Local SSA designates staff person to serve as SOAR liaison (COL)
  - Community continues to build and strengthen relationships with and provide education for community partners, including provider agencies, clinics, hospitals, funders, etc. (COL)
  - Have mechanism in place for quality review of SSI/SSDI applications (QR)
  - Integrate community SOAR planning in current homelessness planning at the local level (e.g. Continuum of Care Plan, Ten-Year Plans to End Homelessness) (LDR)

**Documentation Required (please submit to NCCEH via email at [soar@ncceh.org](mailto:soar@ncceh.org))**

<b>Task</b>	<b>Documentation</b>
Hire NC SOAR Certified dedicated team (at least two full-time workers)	Job description, name, title and contact information of dedicated SOAR staff submitted to NCCEH
SOAR team maintains community contact and accepts community referrals for applications	Copy of community referral process submitted to NCCEH
Local SSA designates staff person to serve as SOAR liaison	Name and contact information for SSA designated staff person along with any written agreement with SSA submitted to NCCEH
Community continues to build and strengthen relationships with and provide education for community partners, including provider agencies, clinics, hospitals, funders, etc.	Examples of SOAR outreach work submitted to NCCEH
Have mechanism in place for quality review of SSI/SSDI applications	Copy of quality review practice submitted to NCCEH
Integrate community SOAR planning in current homelessness planning at the local level	Report on how SOAR is integrated into local homelessness planning submitted to NCCEH