Using the SOAR Online Application Tracking (OAT) System for Outcome Reporting

Substance Abuse and Mental Health Services Administration
(SAMHSA) SOAR Technical Assistance Center
Policy Research Associates, Inc.

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Disclaimer

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Purpose and Objectives

- Learn how to access and utilize the SAMHSA SOAR Online Application Tracking (OAT) System
- Understand why it's important to track your SOAR-assisted SSI/SSDI application decisions
- Learn how to run reports to highlight SOAR success and promote quality

Online Application Tracking (OAT)

- A web-based program that allows case workers to keep track of their outcomes
  - Free
  - Easy to use
  - Accessible from any web browser
  - Nothing to download
- On a secure server
- HIPAA compliant
  - No personal identifying information is collected

https://soartrack.samhsa.gov

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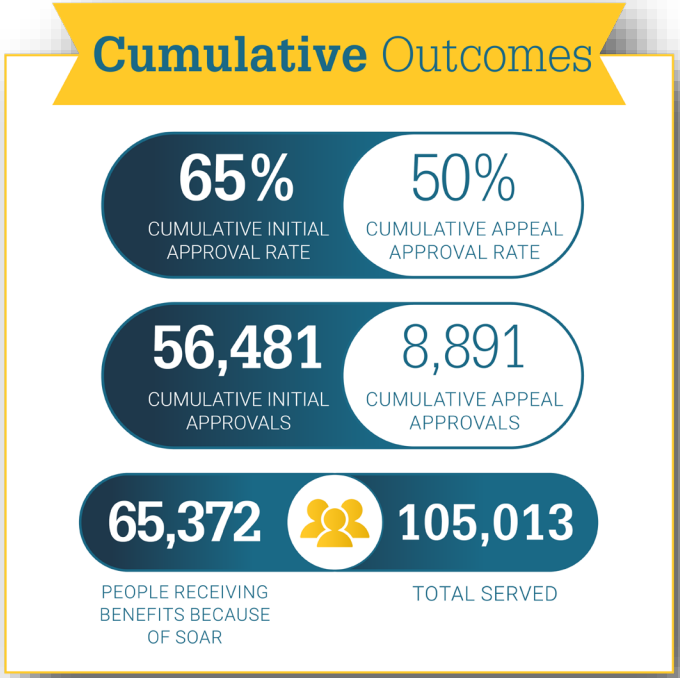
Why Track SOAR Outcomes?

- Assess effectiveness
- Provide quality improvement
- Celebrate successes
- Secure future funding opportunities

SOAR Works!



*National SOAR outcomes as of June 30, 2023

https://soarworks.samhsa.gov/about-the-model/oat-and-outcomes

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2023 Financial Outcomes

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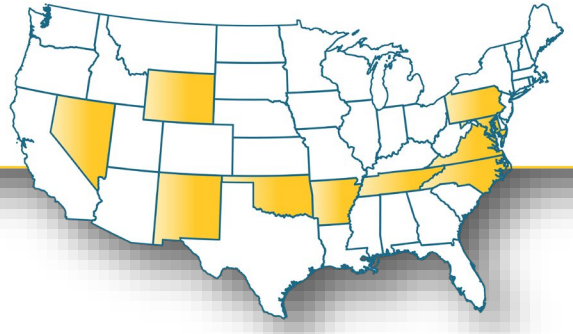
SOAR Super Stars!

Top States

81% APPROVAL RATE

TOP 10 STATES*

Tennessee	Wyoming
Pennsylvania	Oklahoma
Maryland	Virginia
Arkansas	Nevada
North Carolina	New Mexico



SOAR Critical Components

Using these five SOAR Critical Components, case workers play a central role in gathering complete, targeted, and relevant information for SSA and DDS, resulting in high-quality SSI/SSDI applications. These components significantly increase the likelihood of an approval for those who are eligible.

1. **Serving as the Applicant's Representative**
2. **Collecting and Submitting Medical Records**
3. **Writing and Submitting a Medical Summary Report (MSR)**
4. **Obtaining a Co-signature on the MSR by an Acceptable Medical Source**
5. **Completing a Quality Review of Applications Prior to Submission**

*Inclusion: Highest cumulative approval rates on initial application for states with at least 250 cumulative decisions, at least 24 decisions in 2023 (2 per month), and a 2023 approval rate above the national average.

Combined, these states had 22,245 decisions

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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.

Outcomes in OAT

- Outcomes for initial applications and appeals
  - Approval rates
  - Time to decision
  - Critical components
- Optional outcomes
  - Housing
  - Employment
  - Medicaid and other public benefit reimbursements

OAT Registration

Track outcomes and get funding!

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OAT WORKS
Online Application Tracking

Register for OAT
Online Application Tracking (OAT)

All OAT registrants must be approved by the SAMHSA SOAR TA Center. You will receive an email from soaroat@prainc.com confirming receipt of registration, and another when your registration has been approved. If you have any questions, please contact us at soaroat@prainc.com or 518-439-7415 x2.

First Name *

Last Name *

Password * What's This

Verify Password *

Email *

Phone *

Ext

State *
Select State

Role * What's This
Select Role

Agency *
Select Agency

County/Parish *
Select County/Parish

City *
Choose cities...

Funding Source *
My position is funded by

SOAR Training(s) I have Completed

SOAR Online Course: Adult Curriculum

Date on Certificate (ADULT)
Date must be in mm/dd/yyyy format

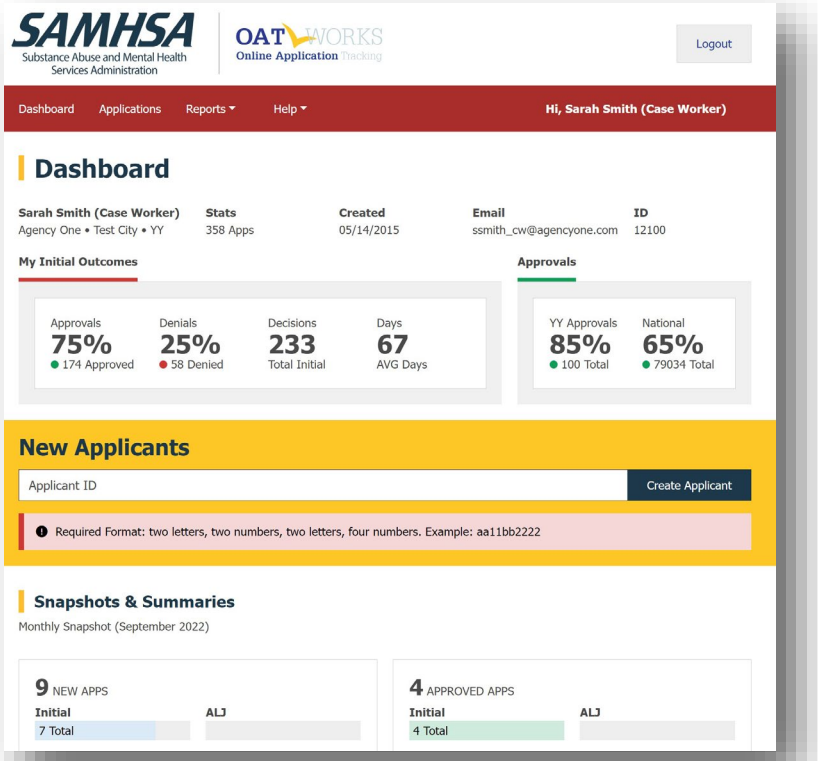
SOAR Online Course: Child Curriculum

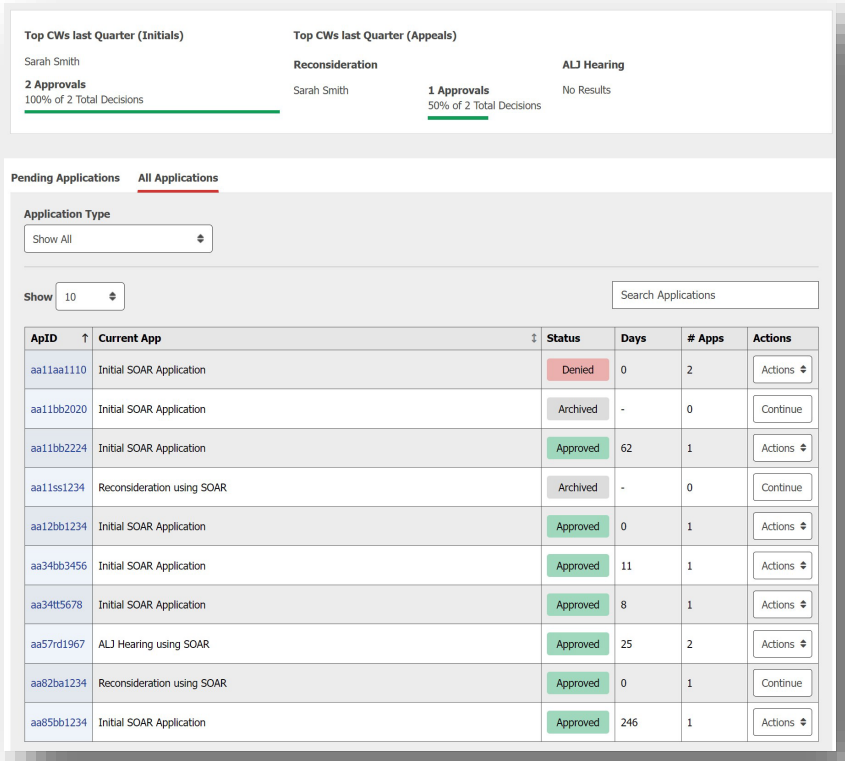
Date on Certificate (CHILD)
Date must be in mm/dd/yyyy format

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.

OAT Case Worker Dashboard

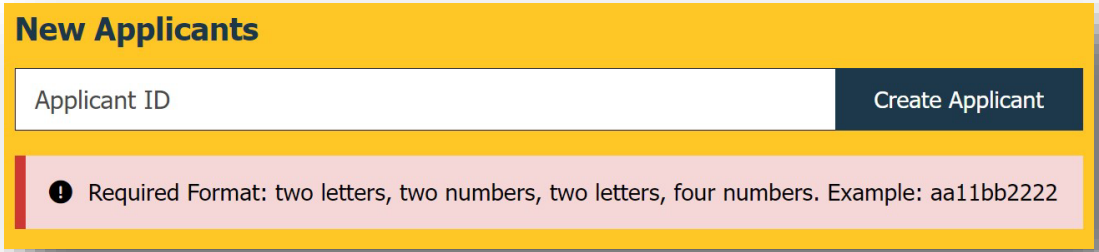




ApID	Current App	Status	Days	# Apps	Actions
aa11aa1110	Initial SOAR Application	Denied	0	2	Actions
aa11bb2020	Initial SOAR Application	Archived	-	0	Continue
aa11bb2224	Initial SOAR Application	Approved	62	1	Actions
aa11ss1234	Reconsideration using SOAR	Archived	-	0	Continue
aa12bb1234	Initial SOAR Application	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
  - Example: AA11BB2222
- Case workers should record Applicant ID in the case file for cross reference!



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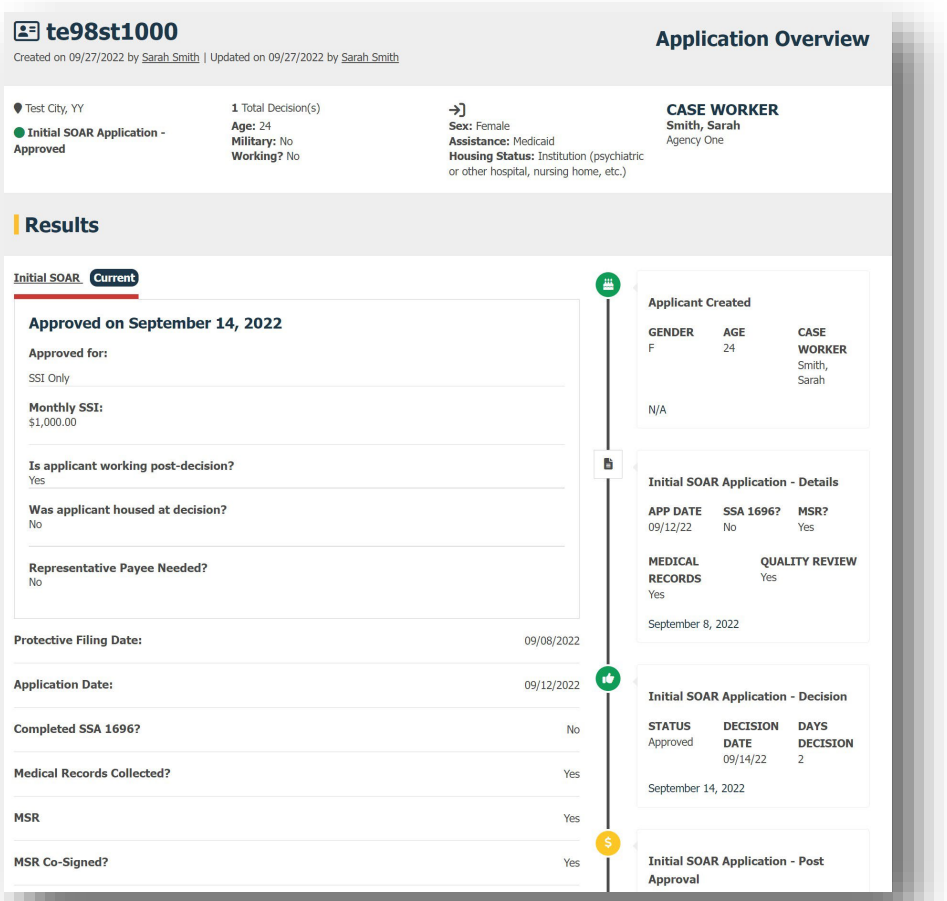
Applicant Overview



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Summary Report

Check out that detailed 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
	Approved / Denied	Approved / Denied	Approved / Denied
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

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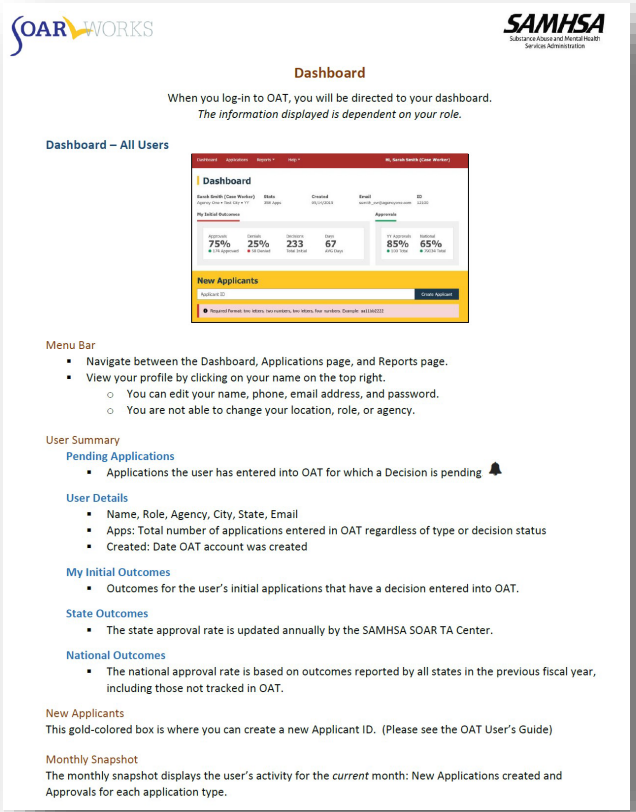
Using OAT as a Management Tool

- 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



SOAR WORKS

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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

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.

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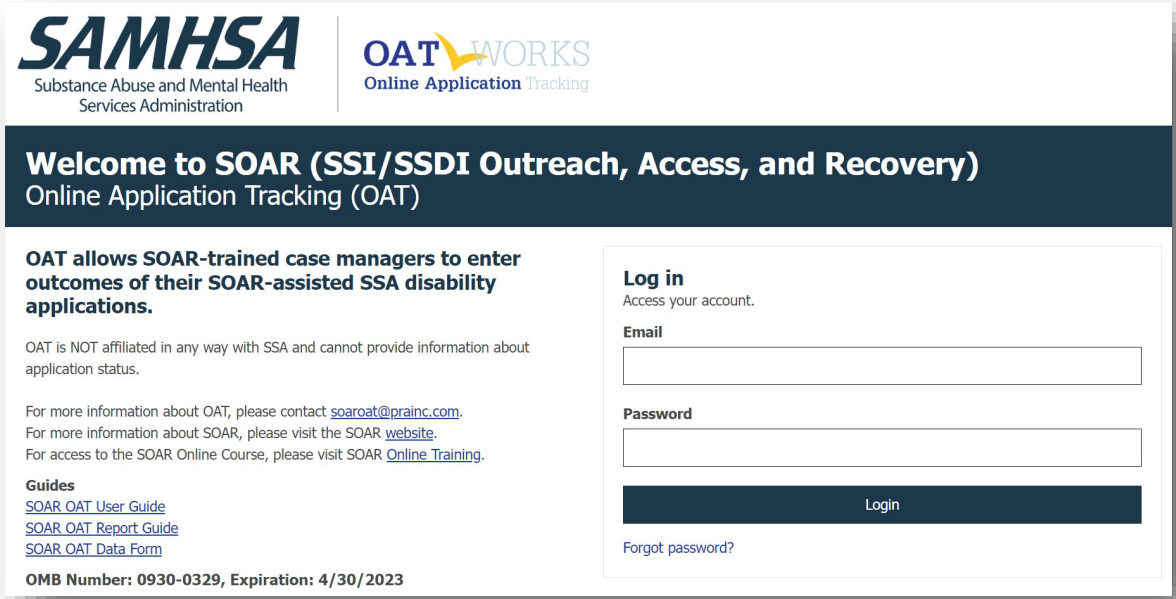
OAT Walk Through

- Entering a new applicant
- Running a report



Next Steps

- Register for OAT.
- Review the SOAR OAT User and Reports Guide.
- Connect with your State Team Lead and Local Lead regarding use of OAT (SOAR website State Directory)
- Begin tracking your SOAR-assisted SSI/SSDI application outcomes!

Question & Answer

Let’s talk outcomes!

Thank You!

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

soaroat@prainc.com

https://soarworks.samhsa.gov

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) ● 1-800-487-4889 (TDD)