

HSC SOAR Pre-Screen Assessment

Updated 7.11.2014

Client Name _____ HMIS # _____

Date of Assessment _____ SOAR Case Manager _____

Instructions: This fillable form allows data entry only into specific locations: the “# points” column in each table and the notes section. A client **may not** score a fraction of the point (i.e. 0.5 points) on any of the questions and also may not score higher than the possible number of points. S/he can score all of the points or zero points. A total score will be automatically generated for each section of the assessment. These scores will automatically populate into the “Pre Screen Score” table on the 4th page. However, a total cumulative score will not automatically calculate in the “Pre Screen Score” table and the SOAR Case Manager should calculate this manually.

Non-Medical Eligibility

- (1 point) Individual has state ID card to confirm identity
- (1 point) Individual **does not** have an outstanding felony warrant for escape or for flight to avoid prosecution
- (1 point) Individual has no income and no resources **Or** Individual has ability to obtain documentation of income and resources
- (1 point) Individual is homeless **Or** Individual was recently homeless **Or** Individual is currently incarcerated in correctional facility
- (1 point) Individual has a rough timeline of medical services, hospital stays and other services that s/he has received in the past five years **Or** There is reason to believe that individual has medical records available at various providers **Or** Individual presents with a substantial disability that s/he is able and willing to visit a medical provider to obtain documentation on
- (4 points) Has been unable to maintain employment because of disability
- (1 point) History of special education placement or has repeated at least one grade in K-12 education
- (2 points) Has been unemployed for longer than one year

TOTAL POSSIBLE POINTS: 10

Major Impairments

- (5 points) Meets state criteria for Serious and Persistent Mental Illness
- (5 points) Has a diagnosed developmental disability (such as but not limited to: mental retardation or borderline intellectual functioning)
- (4 points) Has a documented organic brain disorder or traumatic brain injury
- (4 points) Has one or more chronic physical health problems that are or can be documented on Axis III

TOTAL POSSIBLE POINTS: 18

Psychiatric History

- (3 points) Has a diagnosed Axis II Disorder (*see appendix for examples of Axis II Disorders*)
- (1 point) Has a diagnosed Axis I Disorder (*see appendix for examples of Axis I Disorders*)
- (3 points) Is prescribed psychotropic medications
- (5 points) Continues to have serious psychiatric symptoms even when taking psychiatric medication
- (5 points) Has had documented psychiatric symptoms during periods of abstinence from substance abuse lasting one month or longer (i.e. when hospitalized or incarcerated)
- (4 points) Has documented history of suicide attempts within the past 5 years
- (4 points) Has early history, prior to age 21, or psychiatric symptoms and/or destructive behaviors that may be related to mental illness
- (4 points) Prolonged mental health hospitalization within the past 5 years
- (5 points) Has co-occurring substance abuse and mental health condition

TOTAL POSSIBLE POINTS: 34

Current Psychiatric Symptoms

Instructions: As with the other parts of the assessment, the client can score all of the points or none of the points in this section. No partial points may be awarded.

- (5 points if client currently experiences at least 4 of the following symptoms)—Depression/Bi Polar
 - Difficulties falling or staying asleep
 - Changes in appetite
 - Loss of interest in things you used to enjoy
 - Decreased energy that makes activities difficult
 - Feelings of worthlessness or guilt
 - Trouble staying focused
 - Thoughts of hurting yourself or others
- (5 points if client experiences at least 1 of the following symptoms)—Psychotic d/o
 - See things others say they don't see
 - Hear things others say they don't hear
 - Feel as though others are looking at or talking about you
 - Feel as though others are watching you or want to hurt you
- (5 points if client experiences at least 1 of the following symptoms)—Anxiety (trauma)
 - Being easily startled
 - Discomfort with/fear of people behind you
 - Restlessness or nervousness
 - Panic attacks
 - Constant feeling of being "on guard"
 - Fear that causes you to avoid a particular activity, place, or object
 - Obsession over something that you must respond to
 - Nightmares or recurrent thoughts of a traumatic experience
- (5 points if client experiences at least 1 of the following symptoms)—Cognitive

- Forgetting names, appointments, etc. and needs frequent reminders
- Difficulties remembering past events in your life
- Difficulties reading, writing, or speaking
- Trouble understanding instructions
- (5 points if client experiences at least 3 of the following)—Mania
 - Feelings of extreme energy
 - Decreased need for sleep
 - Racing thoughts that make focusing more difficult
 - Feeling superior to others
 - Feelings that you can accomplish many tasks
 - A spending spree that you can't afford
 - Any risky behaviors without worrying about consequences
 - Impulsivity
- (3 points if you observe at least 2 of the following)—Observation
 - Flat or inappropriate affect
 - Blunted speech
 - Restricted emotions
 - Responding to external stimuli

POSSIBLE POINTS: 28

Functional Impairment

- (5 points if the client experiences difficulty in at least 5 of the following areas)—Activities of Daily Living
 - Hygiene activities
 - Cleaning (without prompts)
 - Trouble getting out of bed
 - Lack desire to cook
 - Trouble grocery shopping
 - Trouble doing laundry
 - Anxiety or confusion riding public transportation
 - Trouble budgeting
- (5 points if the client experiences at least 5 of the following)—Social Functioning
 - Lack contact with family
 - History of poor interpersonal relationships
 - Isolating behaviors
 - History of conflicts
 - Lack of participation in groups
 - Poor co-worker/supervisor relationships
 - Anxiety in social settings
 - Fears that others are targeting

- (5 points if client experiences at least 5 of the following)—Concentration, Persistence or Pace
 - o Difficulty focusing on one task
 - o Jumping from task-to-task
 - o Difficulty completing a task
 - o History of starting but not completing a task
 - o Short term memory deficits (missing appointments, etc.)
 - o Long term memory deficits
 - o Easily distracted and requires redirection
 - o Requires reminders to complete tasks
- (5 points if client experienced at least 3 of the following)
 - o History of history of hospitalizations
 - o History of incarcerations
 - o History of medication changes
 - o Treatment plan changes
 - o Disengagement from treatment when more symptomatic

TOTAL POSSIBLE POINTS: 20

CUMULATIVE POSSIBLE POINTS: 110

Scoring Guide

Between 80 - 112 High SOAR Priority

Between 60 - 80 Apply at staff discretion (following agency staffing)

Under 60 Not SOAR Eligible

Client Notes:

Appendix

Non-Medical Information

- The Protective Filing Date (PFD) is preferably established within the last 2 weeks of the month. It is also suggested that the PFD be established during the second visit with the client. However, if the client has ID and meets SOAR criteria, the PFD may be established sooner.
- If the client does not have a legal form of identification (i.e. state ID, passport, etc.) during the first visit, s/he has until the assessment date to obtain a valid form of identification. The SOAR application process will be postponed until client produces a valid form of identification.
- For the sake of SSI/SSDI applications, Income Sources include but are not limited to the following: earned and unearned sources such as state assistance, alimony, child support, and pension
- Resources include:
 - Assets that can be readily converted to cash
 - Bank accounts, stocks, bonds
 - Property or real estate
 - Insurance over \$1500
 - Money/property disposed of 30 months prior to application for benefits
- Resources cannot exceed \$2000 for individuals or \$3000 for couples
- Assets that are not considered include:
 - House of residence
 - One vehicle
 - Personal possessions (household goods)
 - Life insurance, burial spaces/expense funds (under \$1500)

Medical Information

Axis I:	Axis II:	Axis III:	Axis IV:
Clinical disorders	Personality/ developmental disorders	Relevant physical disorders	Psychosocial and Environmental problems
Examples: <ul style="list-style-type: none"> • Anxiety disorders • Mood disorders • Dissociative disorders • Substance-related disorders • Schizophrenia • Sexual & gender-identity disorders • Eating disorders 	Examples: <ul style="list-style-type: none"> • Paranoid personality disorder • Antisocial personality disorder • Narcissistic personality disorder • Borderline personality disorder • Dependent personality disorder 	Examples: <ul style="list-style-type: none"> • Infectious & parasitic diseases • Endocrine, nutritional, metabolic, immune diseases • Diseases of nervous system & sense organs • Congenital anomalies 	Examples: <ul style="list-style-type: none"> • Problems with primary support group • Problems related to social environment • Educational problems • Occupational problems • Housing or economic problems