1. SOAR Clinical Records [SOAR] Assessment (65E-4.014.6.a (1)(2)(3))--SOAR Assessment is completed 30 days after intake and include the following with client input: a. Current and potential strengths and problems b. information from the intake and evaluation c. Description of the client's current and potential strengths and problems, the client's family and friends, pertinent service agencies with whom the client has been involved, and other social support systems that may contribute to the course of treatment / SSI/SSDI application.

2. SOAR Clinical Records SOAR or Clinical Trx Plan with SOAR integrated (65E-4.014(6), F.A.C.)--Treatment Plan/Service Plan must be completed, and the actions specified in the plan must be initiated for each active client within 30 days after completion of intake.

3. SOAR Clinical Records Cx Client Record (65E-4.014.3.b.2)--Client Record / SOAR Record includes: Staff name who has primary responsibility of client

4. SOAR Clinical / SOAR Records Cx Client Record (65E-4.014.3.b.8)--Client Record / SOAR Record includes: Time-specific release of information, signed/dated by client/guardian, authorizing a designated the agency to receive the information

5. SOAR Clinical Records Cx Client Record (65E-4.014.3.b.11)--Client / SOAR Record includes: Legal status

6. SOAR Clinical / SOAR Records Cx client records (65E-4.014.3.b.1)--Client / SOAR Record includes: Marital status.

7. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Guardian contact information for minor clients.

8. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Client Name

9. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Address.

10. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Referral source.

11. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Telephone number.

12. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Sex.

13. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Race.

14. SOAR Clinical / SOAR Records Cx Client Records (65E-4.014.3.b.1)--Client / SOAR Record includes: Date of birth.

15. SOAR Clinical Records SOAR / Cx Progress Notes (65E-4.014.3.c)--SOAR Progress notes shall be prepared at least monthly for clients having a SOAR service or treatment plan unless documented otherwise documenting detailed progress on the SSI or SSDI application. Content shall also include any modified service or treatment plan from changes in client's needs, resources, findings.

16. SOAR Clinical Records Cx Progress Notes (65E-4.014.3.c)--SOAR Progress notes shall be prepared at least monthly for clients having a service or treatment plan unless documented otherwise. Content shall include: 1) Contact dates with client, family, friends, or service agencies;

17. SOAR Clinical Records Cx Progress Notes (65E-4.014.3.c)--SOAR Progress notes shall be prepared at least monthly for clients having a service or treatment plan unless documented otherwise. Content shall include: 2) Progress, or lack thereof, relative to the service plan or treatment plan, application status

18. SOAR Clinical / SOAR Records Cx Requirements--Client Identifier

19. SOAR Clinical / SOAR Records Cx Requirements--Record ID

20. SOAR Clinical / SOAR Records Cx Requirements--Client Initials

21. SOAR Clinical Records / SOAR Cx Termination (65E-4.014.3.d)--Termination report including discharge from SSA as 1696 and letter of withdrawal to SSA must be in the record within 4 weeks after official termination of services. Termination Report shall also include date and signature of individual preparing report.

22. SOAR Clinical Records / SOAR Cx Termination (65E-4.014.3.d)--Termination report must be in the record within 4 weeks after official termination of services. Termination Report shall include: 3) If there is a referral to another SOAR Processor or treatment provider, a reason for the referral must be noted.

23. SOAR Clinical Records / SOAR Cx Termination (65E-4.014.3.d)--If no contact over 90 days, file must be closed, unless service or treatment plan indicates less frequent contact. Reason for termination must be included.

24. SOAR Clinical Records / SOAR Cx Termination (65E-4.014.3.d)--SOAR Termination report must be in the record within 4 weeks after official termination of services. Termination Report shall include: 1) Evaluation of impact of agency's services on client's goals or objectives.

25. SOAR Clinical Records / SOAR or similar Cx Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: a. Achievable, observable, measurable.

26. SOAR SOAR / Clinical Records Cx or SOAR Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: g. If service is unavailable within the agency, Primary therapist must link client to appropriate agencies.

27. SOAR SOAR / Clinical Records Cx or similar SOAR Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input

28. SOAR SOAR / Clinical Records Cx or similar SOAR Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: d. Incorporate needs and strengths from assessment

29. SOAR SOAR / Clinical Records Cx or similar SOAR Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: c. Actions needed to attain the goals and staff responsible.

30. SOAR SOAR / Clinical Records Cx or similar SOAR Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: b. Reasonable timeframe

31. SOAR SOAR Clinical Records Cx or similar SOAR Trx Plan (65E-4.014.6.b)--Completed 30 days after intake with the following goals and objectives with client input: e. 1 goal for each treatment issue