



SOAR Compliance 2026

1. SOAR 01 (LSF Standard Contract, Incorporated Document 62) Has a staff member been assigned responsibility for SOAR data-submission quality control, and are 100% of the following critical components completed and accurately reflected in OAT: completed SSA-1696, collected medical records, and a completed Medical Summary Report?
2. SOAR 02 (LSF Standard Contract, Incorporated Document 62) Does the SOAR processor or supervisor attend regularly convened local planning or steering committee meetings to support coordination of services, develop collaborative efforts to implement the SOAR model, identify funding and sustainability needs, and address technical-assistance needs, with participation documented when applicable?
3. SOAR 03 (LSF Standard Contract, Incorporated Document 62) Are at least 75% of SOAR applications completed and submitted to SSA within 60 days of the Protective Filing Date, with the application activity and submission date documented in the participant record when applicable?
4. SOAR 04 (LSF Standard Contract, Incorporated Document 62) Does the dedicated SOAR processor maintain an initial-submission approval rating of at least 65% during each calendar year, and are application outcomes and related participant progress documented accurately and timely in the participant record and applicable tracking system?
5. SOAR 05 (LSF Standard Contract, Incorporated Document 62) If the network service provider offers adult mental health general revenue case-management services under the LSFHS contract, does the provider employ one full-time dedicated SOAR processor whose role and responsibility for processing SOAR applications for adult mental health clients are clearly documented?
6. SOAR 06 (LSF Standard Contract, Incorporated Document 62) Does each full-time dedicated SOAR specialist complete at least 20 SOAR-assisted applications annually, and does the provider maintain documentation supporting the number and status of applications completed?
7. SOAR 07 (LSF Standard Contract, Incorporated Document 62) Does each dedicated SOAR processor complete all required SSI/SSDI application paperwork within 60 days of the Protective Filing Date--the date an applicant first contacts the Social Security Administration indicating an intent to file--and are copies of the completed paperwork maintained in the participant's record?
8. SOAR 08 (LSF Standard Contract, Incorporated Document 62) When applicable, does each dedicated SOAR processor complete the appeal process for applications denied upon initial review, with the denial, appeal activity, follow-up contacts, and outcome documented in the participant's record?
9. SOAR 09 (LSF Standard Contract, Incorporated Document 62) Has each SOAR processor developed a best-practice screening process to identify consumers for whom SOAR applications should be initiated, and is the screening and eligibility determination documented in the participant's record consistent with the provider's screening and intake procedures?
10. SOAR 10 (LSF Standard Contract, Incorporated Document 62) Have all SOAR staff completed the SOAR Online Course and required refresher training at least once every four years, and is documentation of required training maintained in the appropriate personnel records to demonstrate that staff are appropriately trained to provide SOAR services?



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11. SOAR 11 (LSF Standard Contract, Incorporated Document 62) Is 100% of SSI/SSDI application data and outcome information entered into the SOAR Online Application Tracking (OAT) program, and does the information in OAT correspond with the documentation maintained in the participant's record?
12. SOAR 12 (LSF Standard Contract, Incorporated Document 62) Does each SOAR participant have an individualized and current participant record containing the required SOAR intake documentation, SOAR eligibility determination, SOAR service plan, and progress notes documenting services, contacts, outreach, referrals, progress, setbacks, and next steps, and, when SOAR is part of a broader array of mental health services, is the SOAR documentation integrated into the participant's existing mental health record?
13. SOAR 13 (LSF Standard Contract, Incorporated Document 62) Does each participant record contain all applicable and completed SOAR documents, including the SSA-1696, SSA-827, agency ROI, SSA-16 SSDI application, SSA-8000 SSI application, Medical Summary Report signed when possible, medical records, Work History Report, Function Report, and Third-Party Function Report, with documents maintained accurately, currently, and in accordance with the provider's record-keeping requirements?
14. SOAR 14 (LSF Standard Contract, Incorporated Document 62) Does the processor's personnel file contain documentation of SOAR training or refresher training completed within the last four years, demonstrating that the staff member is appropriately trained to perform assigned SOAR responsibilities?
15. SOAR 15 (LSF Standard Contract, Incorporated Document 62) Does the supervisor of the dedicated SOAR processor generate ongoing reports to monitor the processor's progress, including application completion, timely submission, outcomes, and other applicable SOAR performance requirements?
16. SOAR 16 (LSF Standard Contract, Incorporated Document 62) Is the dedicated SOAR processor documented with LSFHS with complete and current contact information, and is the processor's role and responsibility for the participant's SOAR services clearly identified in the provider's records when applicable?