



SOAR RECORDS 2026

1. SOAR 01 (LSF Standard Contract, Incorporated Document 62) Was the SOAR/comprehensive assessment completed within 30 days after intake, with participant input, and does it include the participant's current and potential strengths and presenting problems; information from the intake and evaluation; relevant family, friends, agencies, and social support systems; and information relevant to the participant's treatment and SSI/SSDI application?
2. SOAR 02 (LSF Standard Contract, Incorporated Document 62) Does the participant's SOAR record identify the staff member who has primary responsibility for the participant?
3. SOAR 03 (LSF Standard Contract, Incorporated Document 62) Does the participant's SOAR record include the following:
A time-specific, signed, and dated Release of Information (ROI) authorizing the designated agency or individual to receive or exchange information, when applicable?
Participant's name
Current address and telephone number
date of birth
Sex
Race
Marital and legal status when applicable
Referral source
For a minor participant--the guardian's contact information
4. SOAR 04 (LSF Standard Contract, Incorporated Document 62) Does the SOAR Progress Notes include the following:
Are SOAR progress notes prepared at least monthly for participants with a SOAR service or treatment plan, unless the plan documents a less frequent need, and do the notes document progress, barriers, or lack of progress related to the participant's SOAR goals and SSI/SSDI application?
Are SOAR progress notes prepared at least monthly, unless the service or treatment plan documents a less frequent need, and do they document contact dates with the participant, family, friends, service agencies, SSA, or other relevant parties?
Do SOAR progress notes document the participant's progress or lack of progress toward the goals and objectives of the SOAR service or treatment plan and document modifications to the plan based on the participant's needs, resources, findings, or application status?
5. SOAR 05 (LSF Standard Contract, Incorporated Document 62) Does the SOAR clinical record include the following:
A client identification or chart record number
Participant's first and last name and/or initials
Any other approve identifier when required for record identification or confidentiality
6. SOAR 06 (LSF Standard Contract, Incorporated Document 62) Does the SOAR Termination/Discharge include the following:
If there has been no contact with the participant for more than 90 days, was the record closed unless the service or treatment plan documents a need for less frequent contact, and is the reason for termination documented?
Was a termination/discharge report completed and placed in the participant's record within four weeks after official termination of SOAR services, including discharge from SSA as representative when applicable, and does the report include the date and signature of the individual preparing it, and does it evaluate the impact of the agency's services on the participant's goals and objectives?
If the participant is referred to another SOAR processor, treatment provider, or other service provider,



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does the termination/discharge documentation identify the reason for the referral and document the referral in the participant's record within four weeks of official termination?

7. SOAR 07 (LSF Standard Contract, Incorporated Document 62) Was the SOAR Service Plan or Master Treatment Plan completed within 30 days after intake, developed collaboratively with the participant, and does it identify the participant's goals and objectives that are measurable and achievable, and include the following:

The participant's needs and strengths identified in the comprehensive assessment?

Identify the actions needed to achieve each goal and the staff member responsible for completing those actions?

Reasonable, measurable, and achievable timeframes or objectives for addressing the participant's identified goals and needs?

At least one goal for each identified treatment domain or treatment issue, as applicable to the participant's needs?

If a needed service is unavailable within the agency, does the participant's treatment or service plan document linkage to an appropriate external resource or service provider?