



Hiring and Supervising SOAR Case Workers

A Toolkit for Managers and Leads

A SOAR (SSI/SSDI Outreach, Access, and Recovery) case worker will assist eligible individuals who are experiencing or at risk of homelessness and have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder apply for Social Security Disability benefits. Due to the unique nature of the position, the following are helpful suggestions and key considerations when hiring and supervising SOAR case workers.

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Hiring and Supervising SOAR Case Workers

This toolkit provides information for SOAR program managers who are hiring and supervising SOAR case workers. It discusses skills and key competencies that are commonly looked for in SOAR case worker candidates. Tools include helpful considerations for posting SOAR case worker positions, the interview process, and unique ways to evaluate a SOAR case worker candidate's key competencies.

SOAR Case Worker Skills and Key Competencies

Successful SOAR case workers come from diverse educational backgrounds, as well as professional and lived experiences. However, there are certain skills and key competencies that SOAR programs look for in SOAR case worker applicants.

- Recommended:
 - Strong interpersonal and communication skills
 - Attention to detail and highly organized
 - Advanced writing skills
 - Alignment with hiring agency's values
 - Ability to learn different computer programs
 - Capacity to work independently and meet deadlines
 - Courtesy and professionalism
- Helpful, but not required:
 - A degree or coursework in social work, human services, or a related field, or certification as a Peer Specialist
 - Case management experience
 - Familiarity with public benefits, including Social Security disability benefits
 - SOAR training and/or experience completing SOAR-assisted SSI/SSDI applications
 - Experience working with individuals experiencing homelessness (children, youth, or adults as applicable)
 - Experience working with individuals with serious mental illness/physical disabilities and/or substance use disorders
 - Lived experience of homelessness or mental illness
 - Familiarity with child behavioral health and child welfare systems (for those assisting with child applications)
 - Experience maintaining appropriate boundaries and implementing self-care techniques

Successful SOAR Case Workers

- **Ability to Empathize with Others:** SOAR case workers assist adults and children with serious mental illness, medical impairments, and/or co-occurring substance use disorders. It is important that they are able to provide a safe environment for all applicants (and/or parents for child SSI applications), be open-minded, and non-judgmental. While at the same time maintaining appropriate boundaries to reduce instances of vicarious trauma.
- **Advanced Writing Skills:** Writing a clear and comprehensive Medical Summary Report (MSR) is a critical component of developing a SOAR application. A SOAR case worker should be able to

synthesize information from various sources, including but not limited to hospital records, mental health facilities, school records, information from former employers, and interviews with the applicant and parents/caregivers (for child applications). The SOAR case worker will use this information to create a strong and compelling MSR. As part of the interview process, we recommend that potential candidates submit a writing sample.

- **Computer Skills:** The SOAR case worker will be expected to complete forms via the Social Security Administration (SSA) website, type documents, send emails, scan, fax, and use online search functions. They should be comfortable using a computer and navigating the internet.
- **Strong Time Management Skills:** SOAR-assisted SSI/SSDI applications follow a specific process with deadlines that can impact the receipt of benefits. The SOAR case worker will be expected to complete tasks in a timely way. Organizing and planning for unpredictable situations will be an essential part of the job.
- **Problem Solving and Critical Thinking Skills:** A successful SOAR case worker will be able to effectively respond to new and sometimes complicated situations on a regular basis. It is important that they are able to maintain a positive attitude when faced with challenging situations. A SOAR case worker will also need to be able to assess, categorize, and record symptoms and functioning issues into eligibility categories for effective applications.
- **Excellent Organizational Skills:** Case workers are likely to have multiple active cases, in varying stages of development. It is necessary to be able to multitask and not lose momentum while transitioning from case to case.

Evaluating Candidates

- **Education:** Agencies will vary on their educational requirements. A Bachelor's degree in a human service related field can be beneficial, but it is not required for a candidate to become an effective SOAR caseworker. Individuals with lived experience and others with professional experience working with individuals who are experiencing or at risk of homelessness can be very effective in SOAR case worker positions. A SOAR case worker should also have empathy and a passion for assisting underserved populations.
- **Past Experience:** Experience reading and/or writing clinical documentation is recommended, as well as working in an outreach setting or with individuals experiencing or at risk of homelessness. Experience, whether personal or professional, with varying disabilities and with the SSA disability benefits application process is recommended.
- **Interviewing Skills:** A successful SOAR case worker should be able to interview applicants regarding sensitive topics, including but not limited to past trauma, mental illness, physical impairments, substance use, and functional limitations. For child SSI applications, these interviews may be with the child, or with the child's parent(s) or caregiver(s). Incorporating a *SOAR Case Worker Practice Scenario* into the interview process will help assess the candidate's empathy, interpersonal skills, and analytical abilities. In the sample practice scenario provided in this toolkit, the SOAR case worker candidate would have an interaction with a fictional SOAR applicant during the interview and would be asked to demonstrate their ability to interact with

the fictional SOAR applicant, gather relevant information, and be able to easily share and synthesize the next steps.

- **Writing Skills:** Requesting that SOAR case worker candidates provide a writing sample as part of the hiring process can be a helpful way to assess writing skills. One option is to provide the SOAR case worker candidate a brief sketch of a fictional SOAR applicant that includes a description, a diagnosis, symptoms, and behaviors of the fictional applicant. Then ask the SOAR case worker candidate to write a description of the symptoms of the fictional SOAR applicant and why these symptoms would affect their ability to work. Alternatively, you could provide the SOAR case worker candidate a sample MSR and ask them to complete an SSA Function Report for the SOAR applicant the MSR was written about. Sample scenarios are provided in this toolkit. If a candidate has completed the SOAR Online Course, they can present the sample MSR written for the practice case with comments from the SAMHSA SOAR TA Center.
- **Experience with SOAR:** If a candidate has completed SOAR training and submitted SOAR-assisted SSI/SSDI applications in the field, ask the candidate for their current SOAR outcomes via the OAT system or by contacting the SOAR State Team Lead for your state. Candidates should have an approval rate and average decision days at or above the state or national average.

Supervising SOAR Case Worker Positions

SOAR case workers have a specialized set of skills and often work independently. Supervising these case workers requires unique considerations.

Logistical Considerations

Interviewing SOAR applicants requires privacy and patience, while submitting online Social Security Administration (SSA) applications requires sufficient computer hardware and internet connections.

- A private office or space to interview SOAR applicants, complete SSA forms, review medical records, and write the Medical Summary Report (MSR) is helpful. Many SOAR case workers use a shared office space and so interviewing applicants and completing SSA forms in the field is also a very common practice.
- It can be helpful for the SOAR case worker to have access to a laptop computer to complete the online Social Security disability application in the field with SOAR applicants. If a laptop is not available, SOAR case workers can complete paper SSA forms with SOAR applicants in the field.
- The SOAR case worker will need access to a computer at the office to complete the online application and a fax machine or scanner to send required SSA forms, medical records, etc.
- A locking filing cabinet is necessary to store SOAR applicants' protected health information.
- In order to complete the application process, a SOAR case worker may need to transport or provide transportation resources to applicants to ensure they get to appointments. Agencies need to consider their current transportation policies to make sure it supports a SOAR case worker's needs.

Expectations for Time Management

SOAR case workers may spend a great deal of time outside the office conducting outreach, attending mental health and medical appointments with applicants, and visiting the Social Security Administration field office.

SOAR Training

A new SOAR case worker will need to successfully complete the [SOAR Online Course Adult or Child Curriculum](#) prior to assisting with adult SSI/SSDI or child SSI applications. We estimate that this course takes approximately 20 hours to complete, though may take additional time if revisions to the course packet are required.

- Each course packet is individually reviewed by an expert at the SAMHSA SOAR TA Center, which may take up to 10 business days. With this in mind, we recommend completing the SOAR Online Course during the first week or two of employment to allow time for the new case worker to receive feedback, a certificate of completion, and begin meeting with potential applicants within the first month of employment.
- Some states also have additional in-person training requirements prior to using the SOAR model. Contact the [SOAR State Team Lead](#) for your area for more information.

Caseloads

The number of individuals a SOAR case worker serves at any given time is likely to be lower than the caseload of others in the agency who are providing case management services. The SOAR model's intensive engagement process necessitates a lower caseload in order to provide comprehensive SSI/SSDI application assistance. The focus of this caseload should be on identifying and engaging with appropriate applicants, submitting high-quality and complete applications, and tracking outcomes.

- We estimate that a newly trained, full-time dedicated SOAR case worker can complete approximately 25 SOAR-assisted applications in the first year, which takes into account the time to complete the SOAR Online Course and become familiar with the SSI/SSDI application process.
- Full-time, experienced, dedicated SOAR case workers can be expected to complete approximately 35 SOAR-assisted applications per year.
- A non-dedicated SOAR position can be expected to submit 1-2 SOAR-assisted SSI/SSDI applications per month, or as their schedule allows. If the case worker is not SOAR-dedicated, a supervisor should consider how they will allocate the case worker's time to accommodate completing applications.
- SOAR-assisted SSI/SSDI applications have a large part of the work in the beginning stages of the application process. In order to not overwhelm SOAR case workers with new applications, caseloads need to be assigned on a rolling basis. We recommend that a newly trained, dedicated SOAR case worker start 1-2 applications per month and a more experienced SOAR caseworker start 2-3 applications per month.

Flexibility

It is important for supervisors to understand that each SOAR-assisted SSI/SSDI application is unique, and the time each application will take to complete may vary based on the complexity of the case.

- Generally, SOAR-assisted SSI/SSDI applications take approximately 20-40 hours over the course of 60 days.
- Ongoing communication between the SOAR case worker and supervisor will be essential to tracking workloads and time in and out of the office for appointments.

Support

SOAR case workers will need support talking through challenging cases, proofreading MSRs, and requesting records and signatures from acceptable medical sources.

- A case worker can navigate these challenges by scheduling weekly or bi-weekly case consultations and supervision.
- Encourage the SOAR case worker to complete all SOAR critical components, and frequently communicate with their [SOAR Local Leads](#) and State Leads and [SAMHSA SOAR TA Center Liaison](#) and attend community case conferencing or other SOAR technical assistance offered.
- Completing the [SOAR Online Course: Adult or Child Curriculum](#) will help supervisors better understand the SOAR model and its application.

- Some medical records requests may require fees. While SOAR case workers are successful at deferring fees for most records, agencies should have a small amount of funding set aside to pay medical record fees if necessary.
- SOAR case workers should not work in a vacuum. They need to have regular contact with other case workers to share information on SSA processes, difficult cases, and handling unique situations. All staffing with outside colleagues should be done without compromising the applicant's privacy rights.

Monitoring for Quality

Most SOAR program managers and supervisors are registered in the SAMHSA SOAR TA Center's Online Application Tracking ([OAT](#)) system. The information gathered from OAT can be used by SOAR managers to monitor quality SOAR applications as well as to provide additional training as needed. Managers can:

- Track the number of applications submitted
- Assess the use of SOAR critical components
- Review SSI/SSDI application approval rates and reasons for denial
- Measure the timeframe to complete applications
- Calculate retroactive payment and monthly benefits amounts

If your state does not use the OAT system, please contact the State Team Lead to determine how to access this information.

Hiring Plan and Job Description

Hiring Plan

To work toward an equitable and successful hiring process it can be helpful to develop a hiring plan prior to interviewing a potential SOAR case worker. This process may include consulting with a racial equity manager, developing a unique job description, and discussing where and how to post the announcement in order to generate a diverse pool of applicants.

A sample job description is provided below, but any job description should be tailored to the unique needs of each agency and community.

Sample Job Description

Position Title: SOAR Benefits Specialist

Classification: Case Manager II

Position Summary

SSI/SSDI Outreach, Access, and Recovery (SOAR) is a model that helps individuals experiencing or at risk of homelessness who have a serious mental illness, medical impairment, and/or a co-occurring substance use disorder apply for Social Security disability benefits.

Responsibilities of the SOAR Benefits Specialist include but are not limited to the following:

The SOAR Benefits Specialist will report to the Case Management Supervisor. The SOAR Benefits Specialist must be able to work in the community and meet individuals experiencing homelessness where they are, including in the woods, under bridges, and in abandoned houses. This position requires at least 2 years of experience working directly with individuals experiencing homelessness who have a serious mental illness and/or co-occurring substance use disorder; evidence of ongoing training and education in related areas such as mental illness, substance abuse, and/or homelessness; an ability to work in non-traditional settings and unstructured environments; and a valid state driver's license with a clean driving record. SOAR training is a plus. The position requires someone who is organized and has an ability to prioritize tasks quickly. The SOAR Benefits Specialist will also attend any trainings/certifications as required by the state.

Position Responsibilities

- Work with referral sources and community partners to identify applicants through team meetings, outreach, and referrals
- Complete interviews with individuals to gather information to complete SSI/SSDI applications
- Gather medical records and other information to complete SSI/SSDI applications
- Write SOAR Medical Summary Reports for individual applications
- Accompany individuals to appointments at the Social Security Administration
- Coordinate visits to medical doctors, psychiatrists, and other specialists to obtain evidence for the application

- Coordinate case management services with partners and help with providing case management services to individuals when needed
- Assist the team with administrative tasks as needed

Position Qualification Requirements

- Excellent interpersonal and communication skills
- Ability to prioritize multiple tasks and meet frequent deadlines
- Superior organizational skills and attention to detail
- Computer experience, including troubleshooting and problem solving and proficiency in MS Office applications (Word, Excel) and database management
- Good writing skills and the ability to analyze extensive data and create written reports with accuracy and brevity
- Ability to maintain professional boundaries and engagement skills with a challenging population and in non-traditional work conditions

Helpful Experience

- A Bachelor's degree in a related field, or certification as a Peer Specialist
- Evidence of ongoing training and education in related areas such as mental illness, substance abuse, and/or homelessness
- Lived experience of homelessness or mental illness
- Familiarity with Social Security Administration's Listings of Impairments
- cursory knowledge of medical and psychiatric terminology and ability to write using same
- Experience with providing outreach and successful engagement to a diverse population, includes working with clients, developing trust, and conducting interviews in non-traditional settings and unstructured environments

Position Work Conditions, include but are not limited to:

- Frequent travel by foot, car, or other means appropriate to making contact with population
- Overtime when necessary to meet project deadlines
- Must be able to adjust to the environment of the target population including making visits to encampments, shelters, and personal living environments when needed
- Sitting for extended periods of time
- Dexterity of hands and fingers to operate a computer keyboard, mouse, and other devices and objects
- Physically able to participate in training sessions, presentations, and meetings
- Travel for the purpose of meeting with clients, training, collaborating with stakeholders, or off-site personnel/management

Interviewing: Process and Questions

Interview Process

Often, agencies will complete both a phone and in-person interview when hiring a SOAR case worker. The phone interview is used as a method to initially screen for key skills and competencies and top candidates are brought in for an in-person interview.

Examples of questions to screen for interpersonal skills, key competencies, and alignment with hiring agency values include:

- What led you to apply for this position?
- What kind of role are you looking for at this point in your career?
- Tell me about a time when you had to juggle competing priorities.
- Tell me about a time when you made a mistake.
- Tell me about a time when someone made a decision you didn't agree with.

Interview Questions

What follows are questions to further evaluate for interpersonal and writing skills, attention to detail, and values that align with SOAR and the hiring agency (preferably asked during an in-person interview):

Introductory Questions

- Tell me about why you are interested in working for our agency. What do you hope to gain from this experience?
- Of your prior experiences, what do you think helped prepare you for this position? Why?
- What do you anticipate will be the most rewarding aspect of this job?
- Writing is a key component of this job. How comfortable would you be writing reports based on someone's collection of medical records? What experience have you had writing something like this?
- What are the causes of homelessness?
- What do you see as your role in supporting an individual's choices?
- What would you do if a Social Security representative or a medical provider didn't return your phone calls?
- How do you take care of yourself when you feel stressed or overwhelmed?
- What kind of supervision/support do you value in the workplace?
- Ask additional resume specific questions when appropriate.

Scenario-Related Questions

- A person who is living with a mental illness that you have known for several months accuses you of stealing their money. They are adamant that they speak with the director and is going to get a lawyer to sue you. How are you feeling? What are you thinking? What do you do?
- A SOAR applicant comes in asking about food pantry resources in your area. Where do you think you might find some options for them? What resources are available to you? In what order would you use them?
- On a scale of 1-10 (1 being extremely uncomfortable and 10 being completely comfortable), how comfortable are you in the following scenarios?

- You are meeting with a SOAR applicant who is mumbling under her breath, not making eye contact, and writing vigorously in a notebook. She is unable to identify why she came into the office today.
- A SOAR applicant yells at you, “How old are you anyway, you don’t know what the heck you are doing! I am calling the mayor’s office and telling them that you won’t help me because I’m black!”
- A SOAR applicant comes in who is intoxicated. He is having a hard time walking and is unable to clearly communicate.
- A mother and child come in. They report they are experiencing homelessness and need help. The mother is crying throughout the interview.
- In the following scenario what would be your first three responses?
 - You’ve arranged to meet a potential client at his camp under the bridge. When you get there he anticipates that it’s you that’s approaching him, so his face lights up with a big smile, he tells you his name and sticks his hand out to shake your hand? As you were approaching you noticed he was among several friends, his clothes were dirty, and his hygiene from head to toe was very bad and he smelled. What would you do?
 - *Note to interviewer on things to look for: Did the candidate offer some form of reciprocal hand shake or fist bump? Did they introduce themselves and ask if he would like to go somewhere for privacy? Did they focus too much on the hygiene concerns?

Interviewing: Candidate Skills Assessments

When hiring a SOAR case worker, incorporating key competency testing into the interview process can help identify qualified candidates. Three sample skills assessments are provided with facilitation suggestions and evaluation considerations: writing functional descriptions, completing forms, and interviewing SOAR applicants.

Skills Assessment: Writing Functional Descriptions

Facilitation Suggestions

- Ask the candidate to read a brief description of a fictional SOAR applicant (adult or child) including diagnoses, symptoms, and behaviors; then ask the candidate to write a description of the symptoms and how those symptoms would interfere with the applicant's ability function and work at the level of [Substantial Gainful Activity \(SGA\)](#) or function the same as a child of the same age without impairments.

Adult Example: Mr. Jones is a 53-year-old African American male who has been experiencing homelessness on and off for the past 7 years. He presents as malnourished and disheveled. He has long uncombed hair and worn clothing and his glasses which are sitting on the end of his nose are held together with purple tape. Mr. Jones has been diagnosed with Schizophrenia and is treated by a psychiatrist who currently provides him antipsychotic medications. Mr. Jones currently resides in the Men's Homeless Shelter as he recently left his apartment, "because my neighbors were trying to poison me." He has not been able to get his medications filled which caused him to experience more significant symptoms such as increased paranoia and delusions. At the shelter, Mr. Jones recently left his belongings in the common area and they were stolen along with his medications. Mr. Jones requires assistance with making his medical appointments as well as getting and taking his medications. He does not take the bus because, "people will hurt me." Mr. Jones was recently admitted to a nearby hospital after his paranoia got so severe that the shelter staff had to call the mobile psychiatric response team. When he was living in his apartment Mr. Jones attended day treatment which helped his symptoms, but he is not currently attending this program because the transportation will not pick him up at the shelter.

Candidate instructions: Please talk about the symptoms Mr. Jones experiences and how they would interfere with his ability to work. Submit this with your SOAR case worker employment application to the hiring worker before you leave today.

Child Example: Annie is a six-year-old girl, applying for Supplemental Security Income benefits by and through her mother, Annette Farnsworth, legal guardian. Annie is diagnosed with Epilepsy, Attention Deficit Hyperactivity Disorder, Opposition Defiant Disorder, Fetal Alcohol Syndrome, cognitive and intellectual disability. Annie is currently enrolled in a self-contained first grade class at the Some Town Elementary School. The school staff have observed Annie's seizures which occur when she gets overly upset. Following a seizure, Annie is lethargic, experiences memory loss and

requires rest. She is currently residing in a family shelter with her mother, and one brother. She is frequently rambunctious at the shelter, running around and yelling at other children and families. She does not seem to be able to sit still and has tried to start fights with other children. Annie's teacher reports that she requires small group instruction and she needs a quiet area to work. She also is easily distracted, has difficulty completing assignments with assistance, can be difficult to motivate, and talks excessively. Annie needs a low student teacher ratio, lots of frequent praise, reinforcements and frequent breaks. She needs small group instruction and visuals with new tasks. Annie's Speech-Language Evaluation from the same year explained that she had "trouble understanding what people are saying, trouble understanding the meanings of words, trouble writing complete sentences, and trouble putting words in the right order when writing sentences."

Candidate instructions: Please talk about the symptoms Annie experiences and how they would impact her ability to function in the same way as a child her age without these impairments. Submit this with your SOAR case worker employment application to the hiring worker before you leave today.

Evaluation Considerations

- *Interviewer note:* Review sample functional descriptions ([adult](#) and [child](#)) and Medical Summary Reports ([adult](#) and [child](#)) as quality examples.
- Did the candidate use person first language?
- Was the candidate able to make the connections between the applicant's symptoms and functional impairments?
- Did the candidate write using clear and easy to understand language, proper grammar, etc.?

Skills Assessment: Completing Forms

Facilitation Suggestions

- Ask the candidate to read a sample [Medical Summary Report-Adult](#) or [Medical Summary Report-Child](#) and ask them to use the information to complete a [Function Report- Adult \(SSA-3373\)](#) or [Function Report- Child Age 6-12 \(SSA-3378\)](#)
 - One task of a SOAR case worker is to absorb information and then synthesize and organize it in a clear way that tells a SOAR applicant's story. In addition to this the SOAR case worker will complete Social Security Administration forms and write a comprehensive Medical Summary Report (MSR). This activity can be a key tool in determining if a candidate can synthesize and convey information appropriately.

Evaluation Considerations

- Did the candidate complete all areas of the Function Report?
- Were they able to identify examples in the Medical Summary Report and provide them in space provided on the form?
- Did the candidate utilize the space available in the remarks section to provide clarifying information?

Skills Assessment: Interviewing SOAR Applicants

Facilitation Suggestions

- Have the SOAR case worker candidate complete a mock SOAR applicant interview to test the candidate's ability to interact with SOAR applicants (or parents/caregivers), communicate effectively, obtain relevant information, and be able to convey next steps.
 - Exercise example: The candidate meets with a staff member who is playing the role of a SOAR applicant or parent/caregiver. The SOAR applicant presents a letter from SSA that they received and would like to know what to do next. It is the hope that the candidate will ask about the presenting issue, gather information and provide guidance regarding next steps (you could also ask the candidate to draft a follow-up plan).
 - Prior to the exercise provide the candidate with information regarding the mock SOAR applicant.
 - Adult Example: The mock applicant is a 57-year-old woman with severe right shoulder and leg pain due to a car accident. She presents very restless and moves around a lot during meetings. She seems to have trouble understanding directions and is easily confused. She has a letter from SSA stating that she meets the medical criteria for benefits, but SSA needs more information from her in order to determine if she qualifies for benefits. She does not understand the letter. She lives alone in a subsidized apartment. She doesn't have a birth certificate but has a state-issued ID. She has a bank account, no life insurance policies, and has not traveled outside the US. She has no other income and has not spent time in a hospital or jail recently. She stated, "The disability process has been so complicated up to this point and I'm so overwhelmed. Now I got this letter and they are asking even more from me, I don't know what I am supposed to do."
 - Parent/Caregiver Example: The mock parent/caregiver is a 24-year-old woman caring for her 4-year-old son. They are living in an emergency shelter after recently relocating to this town. Her son has been diagnosed with autism spectrum disorder. He has trouble communicating and managing his emotions and behaviors at school and in the shelter. The mother comes into the office looking flustered. She has just received notice that she was fired from her new job because she missed too many days. She said, "I was just trying to find services for Taylor. We don't know where to go and we got lost on the bus. How am I going to get the help we need?" Her son sits quietly during the interview looking off into the distance, rocking back and forth.
 - After the interaction, ask the candidate to document the interaction in case notes and report on the interaction and next steps to the supervisor.
- Alternatively, have the SOAR case worker candidate complete a mock SOAR applicant interview using the MSR Interview Guide ([adult](#) or [child](#)). Ask them to ask the questions in two different sections.
 - After the interaction, ask the candidate to document the interaction in case notes and report on the interaction and next steps to the supervisor.

Evaluation Considerations

- During the exercise it is recommended to evaluate the candidate on the following:
 - Did they greet the applicant/parent and state their name?
 - Did they ask questions about the presenting issue and ask relevant follow-up questions?
 - Were they able to relay the information to a (mock) supervisor?
 - Were they able to create and advise the applicant/parent on concrete next steps?
 - Was the candidate able to document their interactions and next steps through case notes?
 - Evaluate their writing for detail, grammar/spelling mistakes, accuracy, and formatting.