



SOARing Together
Series 2: Letter 5, 2021
OAT Review

Hello SOAR Ohio Team,

As we approach the close of another great SOAR year, I wanted to take some time to again encourage all OAT users to update, complete and/or submit all SOAR assisted application data into your OAT database. OAT-Online Application Tracking system allows all of the information for your Social Security disability benefit claims to be recorded in a safe HIPAA compliant database, allows you to know your outcomes, record dates of application submissions and track all your claim's progress. Recording all the needed data into OAT is not only beneficial to you, but to the success of SOAR here in Ohio and across all 50 states.

From a recent email I sent to everyone, here are some tips to help think of what should be included to complete the data needed for all ID entries:

- Follow up with any pending cases-reach out to local field office or the adjudicator to learn application's progress- any claim over 90 days- again contact your local SSA office or DDD
- Review OAT entries for any incomplete data-include as much information that you have; dates, dollar amount of awards and back awards
- Check on the PFD (protective filing dates) -are they past 60 days? are you still assisting client?
- Go through hard copies of applications or your own spread sheet if you use one to ensure you have recorded all claims into OAT
- Review the SOAR OAT website for clarification on recording data into OAT <https://soarworks.prainc.com/topics/oat-and-outcomes>

Also remember:

- You can archive an entry and have it removed from your database when a client is longer active with a SOAR application. Follow OAT to the decision section and click "unknown-archive" and enter the reasoning. Once you have completed this, and to have entry removed, please email the OAT ID **only** and the reason to: dware@prainc.com SOAR TA State Liaison-Dazara Ware amylamerson@cohhio.org and candacetalty@cohhio.org
- All data entered into OAT will be what **you** record, data will not be entered by Social Security, the Division of Disability Determination or even Amy or myself. This is your personal data system for secure and easy reference to all of your SOAR claims.
- Best practice is to create a new ID entry once you set the PFD when you are sure of assisting on the claim. Update other information as it is received from SSA or DDD. The SOAR OAT Data Form and the Quality Review Checklist (enclosed) are great tools when creating a new account or adding information. The SOAR OAT Data form will assist in making sure all information is collected in the client file that ensures fidelity of the SOAR model and critical claims components. Also assists in organizing your efforts as a new SOAR Ohio specialist as it has all the information/questions that are in OAT.

- The Quality Review Checklist is what Amy uses when she is invited to come and review client files for SOAR Ohio compliance and fidelity to the National SOAR model. This form is encouraged to be completed on every client file when you first start out, to make sure that you are completing all critical components of SOAR methodology. Please note that the second page of this document states that it is evaluating the MSR. In SOAR Ohio this is evaluating the data collected on the SSA-3373. Please be sure to complete all information on each form that applies. Sign and date so that if Amy comes for a visit or your supervisors audit your files they see you are completing data compliance reviews. From one specialist to another. Always best to keep on top of this and not put it off until the last minute! ;)
- OAT is useful to track your success as well as on a statewide level. The data collected from Ohio and other states that use the SOAR model provides evidence that SOAR is making a change in our communities. The provided information also allows Amy as our State Lead and Director to address areas for change and improvement, develop simpler submitting process and initiate new practices that is making Ohio one of the leading states in SOAR to better our most vulnerable populations. Recording all application details and outcomes in to SOAR OAT, may take a small effort on your part, but it is a part of the SOAR Ohio certification compliance.

This SOAR Fiscal Year will end on June 30, 2021. Over the next few weeks I will be contacting you all to gently remind you of updating your OAT database. Please reach out to me if you have any questions or concerns. Let's end this challenging year by SOARing high with completed entries, great outcomes and a positive start to a new year!

*"Refuse to be average. Let your heart **SOAR** as high as it will"- Aiden Wilson Tozer*

SOARing Together,
Candace