

SOAR Caseworker:

Reviewer's Name:

Initials of SOAR Applicant:



North Carolina Coalition

securing resources ■ encouraging public dialogue ■ advocating for public policy change

to End Homelessness

NC SOAR: SSI/SSDI, Outreach, Access and Recovery

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SOAR Medical Summary Report Scorecard

This scorecard will be used by staff of the North Carolina Coalition to End Homelessness (NCCEH) to score Medical Summary Reports (MSRs) submitted for SOAR Caseworker Certification.

This scorecard has two goals:

- To ensure that SOAR caseworkers are following the SOAR model as taught by the *Stepping Stones to Recovery* curriculum
- To provide uniform standards for grading and approving Medical Summary Reports for SOAR Caseworker Certification

NCCEH staff will provide a graded scorecard for each Medical Summary Report submitted for SOAR Caseworker Certification and will review the scoring decisions with SOAR caseworkers. Medical Summary Reports must receive the minimum score in each section of the categories below. If the minimum score is not met, further review of the Medical Summary Report will be triggered.

Overall Appearance of Medical Summary Report: 50 Points		
Minimum: 35 Points		
	Possible Score	MSR Score
Is the MSR on agency letterhead?	2	
Is the MSR typed?	1	
Does the MSR include a Reference Section with applicant information (name, date of birth, and SSN)?	7	
Is the MSR free of typos and misspelled words?	5	
Is the MSR written in a clear, present tense as it relates to the applicant's current symptoms and functioning difficulties?	5	
Does the MSR include quotes from the applicant?	5	
Does the MSR include contact information for the SOAR Caseworker?	5	
Is the MSR co-signed by a physician or a Ph.D. psychologist?	10	
Does the MSR include information about the signing physician or psychologist's relationship with the applicant?	10	
	Subtotal	

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Introduction: 15 points		
Minimum: 10 Points		
	Possible Score	MSR Score
Does the introduction include:		
Demographics (age, weight, etc.)?	5	
Physical description of the applicant?	5	
SOAR caseworker's overall impressions of and interactions with the applicant?	5	
	Subtotal	
Personal History: 50 points		
Minimum: 30 Points		
	Possible Score	MSR Score
Does the MSR include personal history information?	THRESHOLD	
Does the personal history information include:		
Description of childhood, including history of abuse or neglect if applicable?	10	
Description of developmental problems if applicable?	5	
History of head trauma if applicable?	5	
Educational history?	10	
Employment history?	10	
Housing and homelessness history?	5	
Relationship history, including relationship with family, past and present significant others, and children?	5	
	Subtotal	
Substance Abuse History (if applicable): 25 points		
Minimum: 18 Points		
	Possible Score	MSR Score
Does the substance abuse history include:		
When abuse started and how it relates to personal history?	3	
Patterns of use (points of heaviest use, triggering events, etc.)?	2	
Information about periods of abstinence and their effect on symptoms and functioning?	5	
Reference and discussion of drugs and alcohol mentioned in medical records?	5	
Does the report state whether the applicant's drug and alcohol abuse is material to the disabling condition?	10	
	Subtotal	

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Information about Medical and Mental Health Disabling Conditions: 70 points (MSR must address at least one Medical or Mental Health Condition)		
Medical Health History (if applicable): 35 points Minimum: 28 Points		
	Possible Score	MSR Score
Does the medical health history include:		
Names of diagnosed medical conditions?	2	
Symptoms experienced by applicant?	2	
Current treatment of symptoms?	2	
Side effects of current treatment?	2	
SOAR caseworker's observations of medical symptoms?	2	
Does the MSR reference applicable Blue Book listings and use the language from the listings to describe symptoms?	10	
Does the MSR include a chronological history of the medical condition, including symptoms and treatment?	5	
Does the MSR cite medical records when discussing symptoms and treatment history?	10	
	Subtotal	
Mental Health History (if applicable): 35 points Minimum: 28 Points		
	Possible Score	MSR Score
Does the mental health history include:		
Names of diagnosed mental health conditions?	2	
Symptoms experienced by applicant?	2	
Current treatment of symptoms?	2	
Side effects of current treatment?	2	
SOAR caseworker's observations of mental health symptoms?	2	
Does the MSR reference applicable Blue Book listings and use the language from the listings to describe symptoms?	10	
Does the MSR include a chronological history of the mental health condition, including symptoms and treatment?	5	
Does the MSR cite medical records when discussing symptoms and treatment history?	10	
	Subtotal	

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Functioning Impairment Information: 45 points		
Minimum: 35 Points		
	Possible Score	MSR Score
Does the MSR include information about functioning impairment?	THRESHOLD	
Does the functioning information include:		
Impairments in understanding, remembering, or applying information?	5	
Impairments in interacting with others?	5	
Impairments in concentration, persistence, or maintaining pace?	5	
Impairments in adapting or managing oneself?	5	
Does the MSR connect functioning impairments to specific symptoms of the disabling condition experienced by the applicant?	15	
Does the functioning information demonstrate the impact of the applicant's medical and/or mental health conditions on the ability to work?	10	
	Subtotal	
Total Score for Medical Summary Report		
Maximum Total Possible: 255 Points		
Medical Summary Reports must receive a minimum score in each section of the categories above. If the minimums are not met, a further review of the report will be triggered.	Total	

Notes and Feedback:
