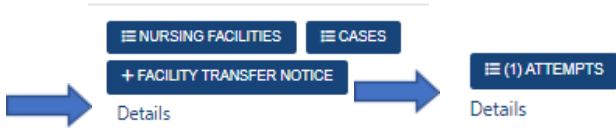
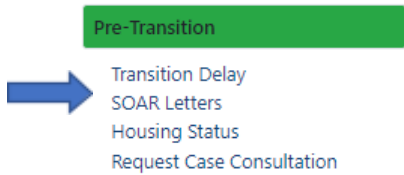


How to add a SOAR letter in the WebApp

1. Login to the WebApp and find the Class Member you are working with.
2. The Class Member must have a finalized assessment for a SOAR letter to become available.
3. Go into the Details of the Class Member's active case, either through the Class Member's page or Cases page.



4. Once in the details of the active case, choose the SOAR Letters link.



5. Add the date to the form, SOAR Outcome and then select the blue Add button.

A screenshot of the 'SOAR Letters' form. The header is 'SOAR Letters'. Below it, it says 'No records found.' and 'X Delete'. The form has three columns: 'Date', 'SOAR Outcome', and 'Letter'. The 'Date' field is empty with a calendar icon. The 'SOAR Outcome' field is a dropdown menu with 'Accepted' selected. The 'Letter' field is empty with a 'Choose File' button and 'No file chosen' text. A blue 'Add' button is on the right.

6. A record has not been created. Go into the Details of this record to add details for populating the letter.

A screenshot of the 'SOAR Letters' form showing a record. The header is 'SOAR Letters'. Below it, it says 'X Delete'. The form has three columns: 'Date', 'SOAR Outcome', and 'Letter'. The 'Date' field contains '12/20/2023'. The 'SOAR Outcome' field is a dropdown menu with 'Accepted' selected. The 'Letter' field is empty with a 'Choose File' button and 'No file chosen' text. A blue 'Add' button is on the right. Below the record, there is a 'Details' link and an 'X' icon. A blue arrow points to the 'Details' link.

7. Add the SOAR details and press Update to save the information.

How to add a SOAR letter in the WebApp

SOAR Letter - Details

[PRINT](#)

Created By	Created On	Updated On
Stephan Goods	12/20/2023	

Member's current SSI/SSDI status * Date *

Applied, outcome pending	12/20/2023
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SOAR Outcome *

Accepted

SOAR Staff * SOAR Agency * SOAR Phone *

Mindy Bristle	UIC	217-586-6039
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Signed Letter

[Choose File](#) No file chosen

Comments

[Update](#)

8. Select the Print button at the top of the form and the letter should pop-up and ask you to select where to print the document.

How to add a SOAR letter in the WebApp

Comprehensive Class Member Transition Program SOAR Services

Form Date:	12/20/2023	Decree:	Williams	Prime:	BHC
Class Member's Name:	Ashlyn Anteater			Medicaid RIN:	032819921
DOB:	3/28/1992			Guardian:	
Current Address:	123 College Ave, Mahomet, IL, 61853			Phone:	2175866039
Facility's Name:	ABBOTT HOUSE			Admission Date:	10/5/2021
Care Manager:	Stephan Goods			Agency:	Caspio

*SOAR stands for SSI/SSDI Outreach, Access, and Recovery

Date: 12/20/2023

To: Illinois Department of Human Services

I, **Ashlyn Anteater**, understand that SOAR* will increase my chance of getting income through SSI or SSDI. I understand that if I accept SOAR services, staff will help me by summarizing all my medical records for Social Security. I understand that the purpose of SOAR services is to help me get an income. This will help me move and get help in the community.

My current SSI/SSDI status is:

I accept SOAR services as described above.

Care Manager:	Stephan Goods	SOAR Staff
Agency:	Caspio	Agency
Phone Number:	+1(773)572- ext. 5311	Phone

Comments:

Class Member Signature: _____

Date: _____

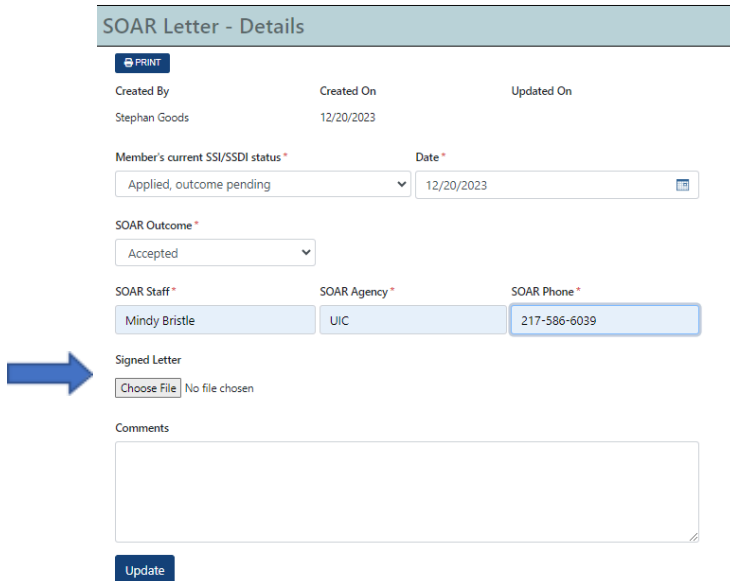
Guardian Signature: _____

Date: _____

9. Use the back button in your browser to go back into the Class Member record.

How to add a SOAR letter in the WebApp

- Once the Class Member signs the document, scan the signed document, and upload it to the SOAR record you created. See step 6 above to reference going to the details of the SOAR record.
- While in the details of the SOAR record, select the Choose File button and find the document you are uploading.



SOAR Letter - Details

PRINT

Created By	Created On	Updated On
Stephan Goods	12/20/2023	

Member's current SSI/SSDI status * Date *

Applied, outcome pending 12/20/2023

SOAR Outcome *

Accepted

SOAR Staff * SOAR Agency * SOAR Phone *

Mindy Bristle UIC 217-586-6039

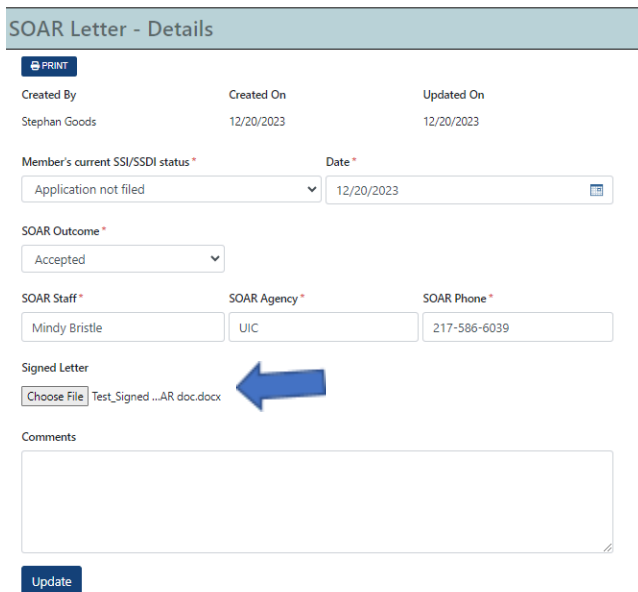
Signed Letter

Choose File No file chosen

Comments

Update

- Once the file is selected, choose the Open button and the document will be attached to the record.



SOAR Letter - Details

PRINT

Created By	Created On	Updated On
Stephan Goods	12/20/2023	12/20/2023

Member's current SSI/SSDI status * Date *

Application not filed 12/20/2023

SOAR Outcome *

Accepted

SOAR Staff * SOAR Agency * SOAR Phone *

Mindy Bristle UIC 217-586-6039

Signed Letter

Choose File Test_Signed ...AR doc.docx

Comments

Update

- Press the Update button to save the changes to the SOAR record. The file name should now be above the Choose File button.

Signed Letter
Test_Signed SOAR doc.docx
Choose File No file chosen
 Remove

- If you realized after saving the record that you uploaded the wrong file, you can check the box next to Remove, and then Update and the file will be removed, and you can choose another file (as described in step 11 above).

How to add a SOAR letter in the WebApp

15. If you select the Go Back button at the top of the screen, you will be taken back into the SOAR Letters screen and will see the attachment you uploaded.

[Go Back](#)

SOAR Letters					
Date	SOAR Outcome	Letter			
12/20/2023	I accept SOAR services as described above.	Test_Signed SOAR doc_2.docx	Choose File No file chosen	Add	Details

Records 1-1 of 1

16. Pressing the Go Back button at the top of this screen will take you back to the case details.