SOR I – SOR II Rollover Process

How to enroll clients into the new grant cycle

OMNI
November 2020

This document summarizes the process for enrolling in SOR II the clients who completed a GPRA while receiving SOR I funded services and are now receiving SOR II funded services.

Clients who are *not* receiving SOR II services don't need to be rolled over to SOR II. However, you still should do their 6-month follow-up from SOR I if open after October 1, 2020.

Clients receiving SOR II services are divided into three groups:

A

Clients Rolling Over from SOR I to II

Clients who completed intake and follow-up windows in SOR I, still getting services

B

Clients in No-Cost Extension of SOR I

Clients who did an intake in SOR I but have not yet done a follow-up (as of Nov 6, 2020)

C

New Clients

New clients that entered SOR services in October 2020 or later

"Rollover" process for the groups:

A

1. **Get consent** from client to continue in new grant
2. **Conduct SOR II follow-up interview** 6 months after consent (with gift card)

B

1. **Conduct SOR I follow-up** when the time comes and **get consent** at that time to continue in new grant
2. **Conduct SOR II follow-up** interview 6 months after consent (with gift card)

C

1. **Conduct SOR II intake survey**
2. **Conduct SOR II follow-up** interview 6 months after intake (with gift card)

For groups A and B, OMNI will enter past GPRA data from the client into SAMHSA's system for their SOR II intake.

Group C is the only one that requires an *intake* interview.

Tracking sheets

A

- Removed from your tracking sheet since they have closed out of SOR I.
- If you get consent to continue in SOR II, they will re-appear with the new follow-up window.

B

- Stay on the tracking sheet so you know when to do the SOR I follow-up.
- Removed from sheet after SOR I follow-up is complete.
- If you get consent to continue in SOR II, they will re-appear with the new follow-up window.

C

- Will get added to the tracking sheet as you complete the intake interview (no changes to current process for new clients)

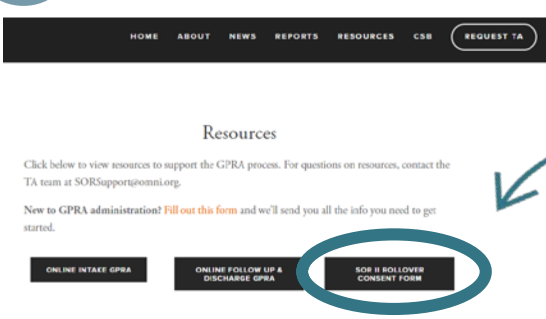
Group A & B List

- The **"Group A and B Clients_11062020"** spreadsheet in your CSB Dropbox folder will list all group A and B clients, identifying which group they are in.
- This list will include all *potential* clients that need to be rolled over into SOR II. If the client is no longer receiving services, you don't need to roll them over.

Client Scenarios

	A	B	C
Client did a SOR I intake and the CSB submitted an administrative follow-up before October 2020. They are still receiving SOR-funded services.	✓		
Client did SOR I intake survey. The follow-up window was open April-June 2020, but no survey (interview or admin) was done. They are still receiving SOR-funded services.	✓		
Client did SOR I intake and their follow-up window is opening in January 2021. They are still receiving SOR-funded services.		✓	
Client did intake survey in October 2020 and their follow-up window will open in March 2021. They left services at the end of October 2020.			✓
Client did SOR I intake and follow-up surveys before October 2020. They are no longer receiving SOR-funded services.	None! No action needed.		
Client did SOR I intake. Follow-up window is open now but the interview hasn't been done yet. They are still receiving SOR-funded services.		✓	
Client did SOR I intake. Follow-up window is open now and the follow-up interview was just done in October 2020. They are still receiving SOR-funded services.	✓		

Consent



Group A and B clients will use the SOR II Rollover Consent Form to document consent, while Group C will follow the normal consent process for intakes.

When getting consent for Group A clients (when you see them next) and for Group B Clients (at the SOR I Follow-up):

1. Share the **current consent form** on the SOR Support Website with the client.
2. **Explain** that this is the same program that has been funding services previously and if they consent, they will be eligible for another $30 gift card at the follow-up survey 6 months from now.
3. After you get consent, **fill out the online** *SOR II Rollover Consent Form*.
4. After you submit the rollover consent form, the **client will show up on your tracking sheet** so you know when to do their follow-up survey. The follow-up window will be calculated based on the date you received consent.

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