

# SOR III GRPA Transition Process for SOR II Clients

The SOR III Grant Period for Fiscal Year 2022-23 runs October 1, 2022 through September 30, 2023. This document summarizes the process for how agencies can re-intake clients who completed a GPRA while receiving SOR II funded services and who will continue with services during SOR III.

## Intakes



**If you want to enroll a client in the SOR III grant who completed a SOR II intake, they will need a new SOR III Intake completed.** We are unable to rollover clients from the prior grant period into SOR III, per SAMHSA's guidance. The new SOR III Intake GPRA will establish a new Follow-up timeline and will appear on your tracking sheet. If they consent and have not yet received a Follow-up incentive during SOR II, they will be eligible for a \$30 gift card for the re-intake GPRA and for the follow-up survey 6 months from the time of re-intake.

## Consent



**You will need to obtain client consent again before completing any Intake GPRA.**

Share the updated SOR III consent form with the client. Explain that this is the same program that has been funding services previously. Consent may be written or verbal.

## Follow-up & Discharges



**Follow-up: SOR II clients (with intake dates prior to October 1, 2022) who are due for a Follow-up GPRA anytime October 1 or later, will not have to complete a Follow-up GPRA.**

If they continue to receive SOR services and consent to participate in the evaluation, you can take that opportunity to create the new SOR III Intake GPRA for them instead, as described above, if desired.

Note: These transitioning clients can receive their originally planned-for \$30 follow-up incentive to create a new SOR III intake if they have not gotten it yet, and they will also be eligible for another \$30 incentive at the new follow-up time point 6 months after the new SOR III intake. For any brand-new intakes for SOR III, they will only be eligible for the Follow-up incentive.



**Discharge: A client whose intake date occurred in SOR II (before October 1, 2022) and is discharged October 1 or later, does not need a Discharge GPRA completed.**

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This graphics illustrates different scenarios that you might encounter in moving from SOR II into SOR III.

✓ Survey completed	✗ Survey not conducted	\$ Incentive provided
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## SOR II to III GPRPA Transition Process

	SOR II		SOR III	
	Intake	Follow-up	Intake	Follow-up
Scenario A	✓	✗	✓ \$ <small>Incentive funds from SOR II follow-up</small>	✓ \$
Scenario B	✓	✓ \$	✓	✓ \$
Scenario C	✓	✗	✗ <small>Agency opts not to re-intake for SOR III; no surveys required</small>	✗
Scenario D	✓	✓ \$	✗ <small>Agency opts not to re-intake for SOR III; no surveys required</small>	✗
Scenario E	✗ <small>Individual was not a client during SOR II</small>	✗	✓	✓ \$

**Scenario A:** Your SOR II client has had an intake before October 1, but no follow up.

You can opt to re-intake them in SOR III and they can receive their Follow-up Incentive from SOR II to do so. They will also be eligible for a Follow-up incentive at 6 months.

**Scenario B:** Your SOR II Client has an intake and you've done a follow-up with incentive before October 1.

If they are to continue into SOR III, do a new intake (without an incentive) and then a follow-up at 6 months (with an incentive).

**Scenario C:** Your SOR II client has had an intake before October 1, but no follow up.

For SOR III your agency may opt to not re-intake that client. No surveys nor incentives applies. Note that these individuals will not count toward the GPRPA total for the grant so it is up to your agency to make sure you will still have enough participation.

**Scenario D:** Your SOR II Client has an intake and you've done a follow-up with incentive before October 1.

Just like Scenario C, if your agency opts to not re-intake that client, no surveys nor incentives apply.

**Scenario E:** This is a new client who starts with your agency October 1 or later.

Your client was not GPRPA'd during SOR II because they were not around then, so there will be no prior Intake or Follow up GPRPA. They should start fresh with a SOR III intake and follow the protocol for providing an incentive at follow-up.