Delaware County Office of Services for the Aging (COSA)
Phone xxx-xxx-xxxx Fax xxx-xxx-xxxx

Date Registered _____

_____Intake for Information & Assistance
_____Intake for Assessment

I&A Staff _____ID#_____

How did you hear about COSA (Specify) _____
Benefits Check Up Screening Offered Yes/No
If No, Explain _____

Consumer Information

First Name _____

MI _____

Last Name _____

AKA Name _____

Gender _____Female _____Male

Birthdate ____ ____/____ ____/____ ____ ____ ____
* If under age sixty see below

SSN ___ ___ ___ - ___ ___ - ___ ___ ___ ___

Home Phone (__ __ __) ___ ___ ___ - ___ ___ ___ ___

Residential Address

Street _____

Town _____

County _____

State/Zip _____

Municipality _____

INCOME: (To Screen for Waiver/Bridge $ Eligibility)
Monthly Gross Over $1737.00 _____Y _____N _____Unk
Assets Under $8000.00 _____Y _____N _____Unk
Assets $8001.00 - $40000.00 _____Y _____N _____Unk

* Under Age Sixty:
Disability expected to last indefinitely? ____Y ___N___Unk
Disability occur before age 22? ___Y ___N ___Unk
Are there 3 substantial, permanent limitations in:
____mobility ___communication ___learning
____self care ____independent living

Can consumer direct own care? Yes ___ No ___ Unk ___

Mailing Address
(If different than Residential Address)

_____
_____

Referral Source

Name: _____
Relationship:_____
Agency/Facility: _____
Address: _____
_____
Phone: _____

Reason for Referral/Comments

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Help/Service Requested
(If specific Waiver Requested – please note)

_____
_____
_____
_____

TRIAGE FOR MEDICAID WAIVERS
(COMPLETED BY COSA & ENROLLING AGENCIES ***ONLY***)

1. _____ Category # 1
2. _____ Category # 2
3. _____ Category # 3

BenefitsCheckUp of Pennsylvania
c/o The Foundation to Benefit Our Seniors
[Mailing Address]

Job Title:	BenefitsCheckUp Navigator
Department/Program	Charitable Strategies Department
Location:	
Supervisor:	BCU Supervisor
Status:	Full time and part time, flexible hours available

Job Summary

Assist low-income residents of Pennsylvania to maximize their access to public benefits by using BenefitsCheckUp.org. The Navigator will assist consumers in determining their individual eligibility for benefits using the web-based resource and will assist them in the enrollment process in programs for which they are eligible.

Job Specifications

- Communicate with consumers referred to us through our 1-800 number or through our direct mail marketing campaign.
- Gain a thorough understanding of the BenefitsCheckUp application.
- Assist consumers in completing the web-based application and return the results report to the consumer. Also, assist in completing targeted benefits applications for which the client is eligible.
- Document interventions with consumers regarding the application process and provide follow-up as needed.
- Attend special events scheduled at local venues as needed where we provide information and screen consumers using BenefitsCheckUp . Special attention will be paid to Senior Centers, HUD or other subsidized housing complexes or other senior specific venues.

Skills/Experience

- High school diploma or GED required.
- Experience with Microsoft office products (Word, Excel, Explorer)
- The desire to learn how to utilize web-based programs effectively and efficiently
- Good communications skills, both verbal and written, ability to communicate with professionals and consumers (mostly seniors); excellent customer service orientation
- Excellent organizational skills; ability to attend to multiple tasks and multiple details within defined timeframes
- Ability to work independently and as a team
- Enjoy working with people

Salary Range: Up to $10.00 per hour.

Interested candidates should mail their resume to the address above or email their resume for further consideration to xxx.

COMMUNITY NAVIGATOR TRAINING MANUAL

Volunteers as Community Navigators

Those individuals who volunteer their time and energies as BenefitsCheckUp of Colorado Community Navigators are considered an important part of the program's outreach team. Volunteers have rights and responsibilities as part of that team.

YOUR RIGHTS AS A VOLUNTEER[1]

- To be carefully interviewed as to your desires and skills
- To be adequately trained and receive on-going training support
- To be appropriately assigned to a meaningful task
- To be adequately supervised to enable you to do your job appropriately
- To be involved in planning and evaluating your activity
- To be treated with respect
- To be recognized for yourself and your contribution
- To be accepted as a valuable member of your program's team

YOUR DUTIES AS A VOLUNTEER[2]

- Know what your job duties entail and make sure you understand your assignment.
- Know your program information or know how to access information you don't know.
- Complete your commitment to your clients and to the program. If circumstances make it impossible to keep your commitment, explain in a timely manner.
- Treat all persons with respect and acceptance; practice ethno-tolerance.
- Practice good listening and teaching skills.
- Adhere strictly to ethical, moral and legal principles in protecting the privacy of your clients.
- Accept supervision from program staff.
- Ask questions if you don't understand; ask for guidance if you are dealing with a difficult situation.

[1] Linda Whittington, "Volunteers and Juvenile Justice: Hand-In-Hand", a presentation to the Mississippi Judicial College (1987)
[2] Linda Whittington, "Volunteers and Juvenile Justice: Hand-In-Hand", a presentation to the Mississippi Judicial College (1987)

Duties of Community Navigators

BenefitsCheckUp of Colorado volunteers (Community Navigators) are responsible for screening clients through the BenefitsCheckUp® Website and/or assisting those who request follow-up services in accessing benefits and services. When meeting with clients, especially those who request follow-up services, Community Navigators must interview the client and determine the answer to four questions:

- ❑ **What are the client's needs?**
- ❑ **What are the client's expectations of the Community Navigator?**
- ❑ **What can the Community Navigator offer that meets the client's needs?**
- ❑ **Can the client's expectation and the Community Navigator's offering be reconciled to access available services for the older adult and/or the caregiver?**

Every effort will be made to assure that the match of the Community Navigator and the client is a suitable match; however, there may be times when the volunteer will find her/himself matched with a client with whom s(he) has a personality conflict. When that happens, the Community Navigator should immediately notify agency staff and request another volunteer be assigned.

The initial interview of the client conducted by the Community Navigator will prove to be the most important discussion between the two and will provide important information on the ability of the client to help him/herself and the individual's motivation to do so. The interview will also provide information required to complete a needs assessment on the client.

Some people may be embarrassed about having to ask for assistance when others are capable of doing for themselves. Some people have difficulty putting into words ideas about their needs. Some will appear to be somewhat defensive when dealing with the Community Navigator; some will be very passive and require close questioning to gather information. Community Navigators must remember that the client has a reason for behaving the way (s)he does and that the client has asked for assistance, thereby admitting his/her inability to conduct their own affairs. Whatever the circumstances, most people are capable of identifying needs if the interviewer is adept and appears to be interested, without being judgmental, about the individual's situation.

Meeting and Greeting! What Now?

The initial meeting between two individuals is the most important meeting between them. How two people conduct themselves during the first meeting will establish what their future relationship will be and whether the relationship will be productive. Following some simple guidelines will ensure a "smooth" first meeting,[3]

- Saying a proper hello to a stranger communicates that you are ready to have this stranger "happen" to you and that you mean to "happen" to the stranger. Many people really don't want to know how a person is doing or feeling; however, their greeting will be, "Hello. How are you?". Don't use that greeting (or a like one) unless you really want to know the answer to your question.
- Invading an individual's personal space may be disastrous during a first meeting. Doing so threatens the individual's safety. Generally, three feet is a proper distance to maintain. Some people require more, some less. Allow the client's behavior and body language to dictate the distance you should remain from the client.
- Shaking hands is considered by some to be a proper form of greeting, some consider shaking hands as being the polite thing to do; many do not want to be touched, even to shake hands with another. When meeting a person, allow him/her to initiate a handshake if there is to be one.
- Introduce yourself to the stranger, simply. Don't get into an involved history of your job. Most clients don't want to hear that; those who do will ask you. If you are meeting to conduct a screening, explain the process (simply) and determine:
  - ❑ Whether the client would like to complete the on-line application her/himself,
  - ❑ Whether the client would like your assistance completing the on-line questionnaire, or
  - ❑ Whether the client would like to complete a "hard copy" questionnaire and have you input the data.
- When meeting a client for the purpose of assisting him/her in applying for benefits, state your purpose without reminding the client that (s)he asked for your help. Example: "Hi, my name is Jane Doe. I am here to work with you to get you enrolled in Medicaid. Shall we talk about how we should go about it?"
- When meeting a client, be enthusiastic and positive regardless of the client's behavior. Think possibilities and probabilities. If the client meets you with negatives and excuses, gently explain them away, without being judgmental or accusatory.

[3] Adapted from "Meeting and Greeting! What Now?", Monograph by Linda Whittington, 1988

Interviewing A Client

There are two parts of an interview – questions and answers. In a good interview conducted in a quiet place, the interviewer must ask properly worded, open-ended questions, listen carefully as the client responds and interpret the client's response. Listening is an art and requires effort on the part of the interviewer. Some simple guidelines[4] to follow are:

- **L**isten with all of you - your ears, eyes and senses. Pay attention to the body language, the facial expressions, and the overall behavior of the speaker, the voice inflection used by the speaker. Listen to understand what the speaker is really trying to communicate.
- **I**nterpret what the speaker is trying to communicate, not only what (s)he is saying, but also by how (s)he is speaking. Don't be too quick to jump to conclusions, though. Try to empathize with the speaker; accept the speaker's values/opinions although they may not correspond to yours.
- **S**how, through your body language, facial expressions, etc., that you are interested in what the speaker is saying and that you are actively listening.
- **T**alk only when the speaker is not talking. Don't interrupt what the speaker is saying. Ask questions designed to gain information. Don't allow your questions to disclose your prejudices. Decide what you will say next only after the speaker is finished. When talking, speak slowly and distinctly.
- **E**xpect differences in language usage. Try to understand the speaker's meaning behind words that may be different than yours. Ask for clarification if you don't understand a word or reference. (State and regional differences exist in the way people communicate. Likewise, there are variations in communication between neighborhoods in the same city with words having different meanings.)
- **N**ever become confrontational during discussions with clients. Never argue with a client about meanings. Never hurry a client into answering quickly. The client will say what needs to be said in his/her own way. When interviewing an older adult, always remember that the client may be slower to respond than a younger person. Give the client all the time (s)he requires to formulate a response.

[4] "Listening With All of You", a monograph by Linda Whittington, 1988

The Community Navigator as Teacher

Much of the Community Navigator's interaction with a client will be as a teacher. If the Community Navigator has done his/her job well, the interactions with the client(s) will serve to empower both the Community Navigator and the client. Community Navigators, when working with adults, should remember to use a common sense approach:

- Whatever the age of the adult, the individual learns more quickly if there is mutual respect between the teacher and the student. Condescension will be considered as disrespect by the client; criticism will be considered as disrespect by the client and learning will be impeded.
- After the age of eighteen, an individual begins to slow in his/her processes. The older a person, the more likely that natural aging changes have impacted the person's ability to process information. The speed in which nerve endings conduct messages from one point to another slows with age. Therefore, it may take older adults longer to process the information they are receiving.
- Aging also impacts, in the majority of healthy people, hearing and vision. Not being able to hear and/or see well impacts an individual's ability to learn. Written materials should be large enough to be read easily and any auditory materials, including the voice, should be loud enough to be heard easily by the typical individual.
- Adults come to you with a vast array of life experiences; those experiences impact the way an adult learns. Their experiences may impede learning or they may accelerate learning.
- Adults are not children, do not learn in the same way children learn and should not be treated like children.
- Adults need to participate actively in the learning process. Adults learn more quickly when problem-solving or making decisions.
- Adults want to be treated with respect; they do not learn when they feel threatened, self-conscious, embarrassed, etc.
- Adults learn best when they are a part of the process, when they share the responsibility for planning and carrying out a task.
- Adults want to learn and become more competent in their abilities.
- Adults, for the most part, have fun learning when the process is not intimidating or embarrassing.
- Adults increase in self-esteem and confidence when they feel empowered and are better able to learn new skills and deal with new situations more readily.[5]

[5] "The Common Sense Approach to Teaching Adults", a monograph by Linda Whittington, 1987

The Youth Opportunity Program (YO) is designed to provide young adults, 14-21 years of age, residing in the City of San Antonio's designated Empowerment Zone, services to increase and strengthen their education and employability. The focus of the YO Program under the umbrella of the Department of Community Initiatives, is to reengage disconnected youth. Participants in the program are provided essential services, support and training, allowing them to overcome possible barriers to education and employment.

NEW! Industry Specific Training

Property Management	**Health Careers**	**Landscaping**	**Customer Service**

ACTIVITIES & TRAINING

GED Preparation	**Job Training**
Occupational Skills Training	**Job Club**
Computer Classes	**Counseling**
Peer to Peer Mentoring	**Internships**
Sports Activities	**Job Fairs**

Department of Community Initiatives Mission

To serve as a catalyst for coordinating resources and partnerships that promote economic self-sufficiency, family strengthening, and enhance the quality of life for children, families and seniors and ensure greater public accountability for the investment of resources.

Contributed by Alamo Area Council of Governments

PRESENTATIONS - 101

1) Who do you know?

2) Where do/did you work?

3) Where do you, your family and friends:

- ☐ Shop
- ☐ Eat
- ☐ Bank
- ☐ Attend Church
- ☐ Receive Health Care Services
- ☐ Do your laundry and dry cleaning
- ☐ Socialize

4) Make a list of the people, places and things listed above:

1. List the names of contact people, phone numbers and addresses.

2. When making contact, briefly tell them:

- ❖ Who we (you, your volunteer site and agency) are.
- ❖ Why your presentation is important
- ❖ Our purpose

3. Inform them that you can provide a presentation that is 15 minutes to 1 hour.

4. Remember, you know more people than you think you do.

PRESENTATION IDEAS

1. Park Districts
2. Churches and Religious Organizations
3. Police Departments
4. Senior Centers and Community Meal Site – Activity Centers
5. Senior Buildings and Retirement homes
6. Municipal and Government offices
7. Township offices and affiliated groups
8. Libraries
9. Colleges and Schools
10. Hospitals, Clinics and Nursing Homes
11. AARP Chapters
12. Retired Teachers Associations and groups
13. Specials Groups:

- Visions Impaired
- Hearing Impaired
- Disabled/Handicapped
- Support Groups
- Jay Cees
- Kiwannas
- Golden - K (Kiwannas)
- Rotary Clubs

14. Outposts:

- Banks
- Stores (Department, Clothing and Grocery)
- Illinois Department of Human Services/Public Aid offices
- Community Organizations (CEDA, Salvation Army, Red Cross, etc…)
- Social Security Administration offices

15. Last, but not least!

- Revisit
- Other

Outreach / Presentation call sheet

MY NAME IS_____

I am calling from _____(your agency name)

May I speak to your Director / Supervisor / Manager please; (OR Contact Person by name) (If this person is not available, get their name; phone number, date and time they will be available).

OUR JOB IS:

(A) To ensure that seniors are well informed about services and programs available for people age 60 or older.

(B) To help seniors apply for the benefits, services and programs that they qualify for.

(C) To answer questions and assist seniors with resolving or reporting any problems they have with programs.

***NOTE:* ALWAYS WRITE DOWN:**

1. The name of the person you spoke with, time & date you called.

2. What are the BEST presentation days for them: _____
During what hours _____ AM/PM to _____AM/PM.

3. Are they planning any events this year (that we may be able to participate in)? List dates/times/places.

4. Get a mailing address with addressee name and fax number.

NAME OF ORGANIZATION_____
ADDRESS _____
PHONE NUMBER (S)_____FAX NUMBER_____
DATE & TIME YOU CALLED_____SPOKE WITH_____

PRESENTATION DATE: _____
PRESENTATION TIME:_____
LOCATION/ADDRESS:_____
DIRECTIONS: _____

VOLUNTEERS/STAFF ASSIGNED TO THIS PRESENTATION_____

Pierce County Aging and Long Term Care and Senior Information and Assistance have teamed up with the National Council on the Aging and the Bill and Melinda Gates Foundation to provide local seniors with valuable assistance to help improve the quality of their lives.

Through **Benefits**Check*Up,* Seniors, their family members, or caregivers can now make use of an Internet tool that screens for over 1,000 state and federal programs for seniors and over 800 prescription drugs and 120 pharmacy drug discount programs. The service is particularly useful for long-distance family caregivers seeking services for an out-of-state relative.

BenefitsCheck*Up* can be accessed via the county's new Senior Information and Assistance web site at www.PierceSeniorInfo.org. The service is free and completely anonymous. Visitors are asked to provide only their zip code as a locator for many geographic-specific programs.

Two different options are provided to visitors at **Benefits**Check*Up*. A comprehensive screening takes about 15-20 minutes and searches the entire up-to-date data base of federal and state programs as well as drug program eligibility. A second option takes 5-10 minutes and screens only for eligibility for prescription drug programs. Previously this kind of comprehensive search could have taken weeks to complete.

Why is **Benefits**Check*Up* so important? Nearly 1.2 million seniors in America qualify for but don't receive Social Security, 3 million never receive the Medicaid assistance they deserve, and 3.7 million qualify for but do not receive food stamps.

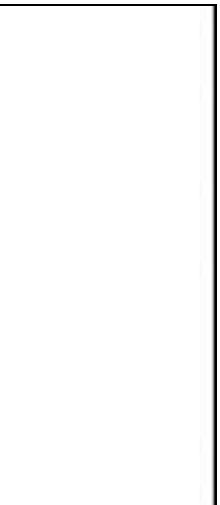
BenefitsCheck*Up* helps older Americans find these and other government programs. The web site provides visitors detailed information on services such as healthcare programs, prescription drug assistance, property tax relief, financial assistance, affordable housing, in-home services, energy assistance, legal services, meal programs, and employment opportunities. The service is not only free of charge, it is also confidential.

Senior who do not have a computer or do not have access to the Internet can contact Senior Information and Assistance for more information about **Benefits**Check*Up*. Call Senior I&A at 798-4600.

Contributed by Pierce County Senior Information & Assistance

BENEFITS CHECK UP SCREENINGS ARE OFFERED AT THESE LOCATIONS:

Bedford Heights	440-786-3208
Broadview Heights	440-526-4074
Cuyahoga County DSAS	**216-420-6840**
Euclid Senior Program	216-289-2985
Fairhill Center for Aging	216-421-1350
Fairview Park	440-356-4463
Lakewood East	216-226-9339
Lakewood West	216-521-1515
Maple Heights	216-587-5481
MetroHealth *Advantage*	216-778-3210
Shaker Heights	216-491-1351
Solon Senior Center	440-349-6363
Strongsville	440-238-7111



GOLDEN AGE CENTERS OF GREATER CLEVELAND

Home Base Cleveland	216-231-4015
James H. Woods	216-781-7236
Lake Shore Center	216-481-0631
Ernest J. Bohn	216-231-2733
Oakwood	440-232-9907
Gunning Park	216-267-9945

CUYAHOGA COUNTY DEPARTMENT OF SENIOR & ADULT SERVICES

1701 East 12th Street
Reserve Square, Lower Level
Cleveland, OH 44114
Phone: (216) 420-6750
Fax: (216) 698-6600

Ohio Relay Service 711
www.cuyahogacounty.us/dsas

Commissioners:
Jimmy Dimora
Peter Lawson Jones
Tim McCormack

Have You Had Your Benefits Checkup Today?

Benefits Checkup

There are hundreds of benefit assistance programs to help seniors today

Try Benefits Check Up
See what you've been missing!
www.benefitscheckup.org/link/cuyahoga

At Cuyahoga County Department of Senior & Adult Services, we know that older adults face ever-increasing costs for health care, utilities, and prescription medicine. There are numerous government and community benefit assistance programs that can help seniors reduce these expenditures. But, until recently, information about these programs was not readily accessible.

Benefits Check Up has made it possible to locate information about federal, state, and Cuyahoga County benefit programs via the internet. We hope all our older residents will take advantage of this outstanding resource.

Susan E. Axelrod, Director,
Department of Senior & Adult Services

FIND OUT IF YOU ARE ELIGIBLE FOR:

- **Prescription Drug Discounts**
- **Health Care Benefits**
- **Property Tax Discounts**
- **Home Energy Assistance Programs**
- **Financial Assistance**
- **Telephone Discount Programs**
- **Housing Assistance**
- **Legal Services**
- **Home Support Services**
- **Nutrition Programs**
- **Senior Employment Services**

WHAT IS BENEFITS CHECK UP?

Benefits Check Up is a web-based program for adults 55+ developed by the National Council on the Aging (NCOA) in 2001.

By completing the Benefits Check Up questionnaire, seniors can quickly identify assistance programs for which they may qualify. Benefits Check Up is also a great tool for long distance caregivers. They can complete the questionnaire for loved ones who live in another city or state, since benefit assistance programs are identified by zip code.

IT'S FAST, SAFE, AND IT'S FREE!

To learn about Cuyahoga County benefit programs, as well as those offered at the state and national level, log on to **www.benefitscheckup.org/link/cuyahoga**. You'll be asked a few questions about your age and income. You will not be asked to supply confidential information, such as your name and social security number.

If you don't have access to a computer, you can obtain help with your Benefits Check Up screening at any of the senior community centers listed on the back of this brochure.

YOUR PERSONAL BENEFIT REPORT

Once you have finished the Benefits Check Up questionnaire, you can print a customized report listing the benefit assistance programs for which you most likely qualify. The report will also describe each individual assistance program, explain how to apply, and list the documents you will need to bring with you when you make application.

BENEFITS CHECK UP CAN HELP CUT YOUR PRESCRIPTION MEDICINE COSTS

Today, there are more than 120 prescription drug programs offered by pharmaceutical companies. A Benefits Check Up screening will enable you to find out if you qualify for one or more of these money-saving programs.

Cuyahoga County Benefits Check Up is funded by a grant from the Cleveland Foundation, and through the generosity of the County Commissioners.

Contributed by Cuyahoga County Department of Senior & Adult Services

NO POSTAGE NECESSARY IF MAILED IN THE UNITED STATES

BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 36661 PHILADELPHIA PA
POSTAGE WILL BE PAID BY ADDRESSEE

FOUNDATION TO BENEFIT
OUR SENIORS
2 LOGAN SQ STE 1900
PHILA PA 19103-9877

It's Easy!
It's Private!
It's FREE!

BenefitsCheckUp® will help you get the benefits you deserve.

Call us today toll-free at 1-800-886-4791 or fill out the attached postage-paid card.

NCOA Benefits CheckUp®
A SERVICE OF THE NATIONAL COUNCIL ON THE AGING

BenefitsCheckUp Pennsylvania is brought to you by the Foundation to Benefit Our Seniors, a non-profit organization dedicated to improving the health, social needs and overall wellness of Pennsylvania's older adults. BenefitsCheckUp is a service of the National Council on the Aging.

Thousands of Pennsylvania seniors should be getting up to $1,200 cash back every year.

Are YOU one of them?

Don't go another day without the benefits you deserve!

Could you use an extra $1,200 in cash every year? Of course! And that's exactly what you may b missing. There are many state and federal programs that could save you money, or even give you cash back. These programs already exist today. It's just that many seniors like you don't know about them.

These programs include:

Medicare Part B Premium Rebate – $799 in 2004

Home Energy Assistance – save money toward the cost of heating your home

Cash Back from Rent or Property Tax Rebates – up to $500 per year

Find out what you're missing with BenefitsCheckUp®. It's FREE!

At BenefitsCheckUp, we work with seniors like you every day to help them find programs that ma life easier. We can help you, too! Here's how:

- ✓ Fill out the attached postage-paid card and drop it in the mail. Or you can call us directly toll-free at 1-800-886-4791.
- ✓ Either way, our trained and friendly staff can handle everything over the phone. You don't eve need to leave home!
- ✓ We will ask you some questions about yourself. Your answers will determine which state and federal programs are right for you. It's easy, it's fast, it's private, and it's FREE.
- ✓ Once the survey is complete, you will receive a free BenefitsCheckUp report in the mail, containing information about the programs for which you qualify.

YES! **I am interested in a FREE BenefitsCheckUp screening. Please call me at the telephone number below.**

Name _____

Address _____

PO Box _____

City/Town _____ Zip Code _____

Phone _____

Best time to call: Morning _____ Afternoon _____

Call us today toll-free at 1-800-886-4791 or fill out the attached postage-paid card and mail it today!

NCOA BenefitsCheckUp®
A SERVICE OF THE NATIONAL COUNCIL ON THE AGING

It's Easy! It's FREE

SUGGESTED TO DO LIST/TIMELINE

FOR MEETING WITH YOUR REPRESENTATIVE

(Establish Timeline According to Need and Schedules)

- ❑ **Identify the policymakers with whom you want to establish a relationship**

My representative's name (local, county, state or national) and contact information: (website, email)

_____

_____

_____

_____

fax number:_____

The names and contact information for my representative's staff contacts:

_____

_____

_____

_____

fax number:_____

- ❑ **Learn the proper way to address letters and other communications to your Policymakers**

Senators:

Addressing an envelope:

_____

_____

_____

_____

Letter Salutation:

_____

When Speaking:

_____

Representatives:

Addressing an envelope:

_____

_____

_____

Letter Salutation:

_____

When Speaking:

_____

Mayors, Executive Councils, Council Members,
Addressing an envelope:

_____
_____
_____
_____

Letter Salutation:

_____

When Speaking:

_____

- ❑ **Learn about your policymaker's interests, passions and background**

Senator _____

Representative _____

Council Member _____

Mayor _____

- ❑ **Develop a story**
- ❑ **Create a one-page fact sheet**
- ❑ **Find out about events where your representatives will be present and make plans to attend (their web sites are a good place to look)**

Event _____

Event _____

Event _____

- ❑ **Ask your colleagues and community partners and contacts if they have any relationships with any members of Congress**
- ❑ **Review and polish your story**
- ❑ **Review and polish your one-pager**

- ❑ **Develop an "Ask"**

  What do you want the person to do? _____
  _____
  _____

  How does this relate to their interests? _____
  _____
  _____

  How will this action advance BenefitsCheckUp objectives? _____
  _____
  _____
  _____

- ❑ **Practice saying your program's mission**

- ❑ **Practice your "Ask" on the following**

  _____ Board members
  _____ Your staff
  _____ Your best friend
  _____ Spouse/partner
  _____ Volunteers
  _____ A local politician (mayor, councilperson, etc._)
  _____ Your dog/cat/fish/other pet
  _____ In front of a mirror

- ❑ **Review contact information and reflect on any changes in your notes**

- ❑ **Review interests, passions and backgrounds and make any necessary changes in your notes**

- ❑ **Send (fax) thank you note or letter to the following:**

  _____ Senator _____
  _____ Staffer_____
  _____ Representative _____
  _____ Others _____
  _____
  _____

- ❑ **Complete a report for each meeting; file for future reference and follow-up**

Tips For Scheduling A Meeting With Your Representatives

(Senator, Representative, Council Member, Mayor)

Step #1: Send a formal letter of request for any city, county, state or national meeting. This letter should briefly describe your organization and what you do – and it should outline your specific reason for requesting this meeting. Your letter should include a specific reference to the jurisdiction that the person represents so they understand you are a constituent. Include your contact information so that the office can reach you to schedule the meeting or ask questions. You can find addresses for specific offices on the internet. **It's very important that you fax this letter to your representative's office, and keep a copy of the letter to re-fax if necessary.** Mail service is still very slow, and mail may take as long as three weeks to reach some offices.

Step #2: The second step in scheduling a meeting is to call the office to follow-up to your letter and nail down the specifics for a meeting. This call should occur 2-3 weeks after you have faxed your letter to provide the office with enough time to follow-up on their own. If you don't know the number for your representative's office, you can check your representative's web site.

When you reach the representative's office, tell them you are calling to follow-up to a faxed meeting request with the representative. You may want to develop a short script to use during these phone calls to ensure that you are clear about why you would like to meet with the representative – and suggesting dates is fine. Reference the letter that you sent to the office. You may be directed to the representative's scheduler or a staffer in the office who covers your issue. Because of the hectic nature of some schedules, you could likely end up meeting with a staffer instead of the representative. Do not dismiss the value of meeting with staff people– they are crucial in providing information to Members and advising them on a variety of issues. They generally will have a little more time, and know your subject better. If the staff person is unavailable, leave them a voice message that delivers your script (including the date you will be available) as well as a return phone number and e-mail where they can reach you.

Step #3: If you left a voicemail, wait a few days and follow-up again on the phone. You may have to be persistent (yet polite) in order to nail down a time for your appointment. Please note that you might be sent to the office scheduler to make the appointment – it just depends on office procedure.

Step #4: Make sure that the team who will be meeting with the staff person is aware of the time and location of the appointment. Reconfirm the time/location with the staff person a few days before the actual meeting.

Step #5: Be on time for your meeting. Otherwise, you may lose your slot of time and your ability to deliver your presentation. If you're running late, call the representative's office and let them know.

Step #6: Send a personal thank you note to the representative and the staff person when you return to your office. A hand written thank you is often noticed more than a form letter.

Telling Our Stories to Policymakers: Preparing A "One Pager"

When you are meeting with policymaker's staff, many will expect you to leave them with a one-page document that succinctly describes your work. After your meeting, this "one pager" will be your link with the staff and may be the only document they keep from your meeting. Here are some guidelines for preparing a good one pager:

- **Put it on your letterhead and include the BenefitsCheckUp logo.**
- **Use special headings, bullets and font styles to highlight each piece of information.**
- **Make sure that the one pager includes complete contact information for someone who is familiar with your program and can be reached easily. If you tend to spend most of your time traveling or in the field, use contact information for someone who spends more time in the office. Make sure Email and Web addresses are also listed.**
- **Start with a concise explanation of your program in language that everyone can understand.**
- **Include a few facts and figures that define the problem your program addresses: "More than ¼ of older residents in our community have received benefits through the assistance of a BenefitsCheckUp screening and 47% of older Americans say they would be more comfortable having a volunteer from a local organization help them find benefits."**
- **Put a human face on your work, either in the organizational description or in the examples you share about your project: "Many older Americans need help with identification, application and enrollment to get the help they need. For William, who has no family in the area to help him, this means having to find ways to access benefits with the help in his community."**
- **Include statistics about the number of people you are working with, and other salient numbers that describe your success: "Last year, we provided assistance to 682 older adults who needed help finding resources in Snoqualmie County."**
- **Include your goals: "We hope to screen 800 seniors and adults with disabilities by the end of 2005."**
- **You may want to create a few bullets that explain what you have to offer representatives and their staff:**
    - **Providing nationwide access to benefits for all older Americans**
    - **Creating a network of agencies that have trained staff available to help constituents with a BenefitsCheckUp screening**

Contributed by WA State BenefitsCheckUp Coordinator

BenefitsCheckUp® is a web based service of the National Council on the Aging that helps older adults learn about public and private benefits for which they qualify.

Overview:

- **Consumer site** available to anyone with access to the internet – **confidential, easy to use**
- Users answer **short questionnaire**, receive a **personalized report** describing programs and how to apply
- **Up-to-date information on 1,300+ benefits:** health, pharmacy, housing, tax, financial, and more
- Recommendations for **BEST combination of public/private Rx assistance programs**
- **Only comprehensive national benefits screening service** for seniors 55+ and adults with disabilities

- **Organizational Edition** subscription gives agencies the **ability to customize** the service to the agency
- Reporting features, multiple data-entry options, follow-up tracking tool, electronic forms
- **Online application and enrollment** for best Medicare Approved Drug Card with wrap around programs
- Supports Area Agencies on Aging and SHIBA through **WA State Pharmacy Connections funding**
- Helps AAA's, SHIBA, Basic Food, faith organizations and other community agencies

Benefits to Washington State Constituents:

- Provides **comprehensive results** for benefit identification, application and enrollment
- Gives frail, elderly and disabled persons **current information** while maintaining **confidentiality**
- **Finds help for basic needs:** nutrition, medication, housing and energy assistance, health care
- **Identifies programs for Rx help with Alzheimers, depression, dementia, chronic illnesses**
- **Helps elders "age in place"** by finding property tax assistance and in-home services
- Offers volunteers an **opportunity to serve others** and **connect with neighbors in need**

Services to Washington State Constituents in 2004:

- **12,479** individuals found help through BenefitsCheckUp in 2004
- **5,755** older, frail or disabled persons received one-on-one assistance from an agency
- **WA State Pharmacy Connections** provided organizational subscriptions for all AAA's and SHIBA
- **Agency screenings increased by 51%** over screenings completed in 2003
- **42% more agencies offered services** in 2004 with Organizational Edition subscriptions
- **Online application and enrollment** for Medicare Approved Drug Discount Card's $600 credit
- **Recommendation for BEST combination of private and public Rx benefits**

Contact: Sally Farrell, Washington State Project Coordinator

Contributed by WA State BenefitsCheckUp Coordinator

Month Date, Year

The Honorable X X
Address
Fax

Dear Senator x:

I would like to request a meeting with you to discuss BenefitsCheckUp, the provider of web-based technology for the Washington State Pharmacy Connections program. Participating with me in the meeting will be [XX, of XX] organization. We are available to meet with you [dates, times, locations.] If early morning is good for you, we could meet over breakfast at one of your favorite spots.

BenefitsCheckUp is a simple and confidential online service created for older Americans, adults with disabilities and their caregivers. The program searches 1,300 federal and state benefit programs, 340 prescription savings programs, and quickly finds the best combination of benefits for which someone may be eligible. **BenefitsCheckUp is now partnering with Medicare to provide online application and enrollment for the Medicare Approved Drug Discount Card's $600 Transitional Assistance.**

In 2004, more than 12,000 Washingtonians used BenefitsCheckUp. Almost half (5,755) of those helped found assistance through agencies that received a customized edition of BenefitsCheckUp, including Area Agencies on Aging and SHIBA sponsors. Pharmacy Connections has proven effective in reaching out to Washingtonians across the state, finding them help and getting them enrolled in the programs that will best serve their needs.

BenefitsCheckUp, a signature project of The National Council on the Aging (NCOA), is available in all 50 states to individuals and organizations. We work with state networks to provide outreach and advocacy for a vulnerable population. Founded in 1950, NCOA is a national network of organizations and individuals dedicated to improving health and independence of older persons; increasing their contributions to communities, society and future generations; and building caring communities.

I look forward to the opportunity to share our decision-support technology and stories from those who have received assistance with the help of BenefitsCheckUp. Ongoing support for Pharmacy Connections will help the AAA's and SHIBA continue their mission in Washington state, helping neighbors get the medications they need and more. To schedule a meeting, please contact me directly at (xxx) xxx-xxx or [e-mail.]

Sincerely,

X X
Position
Organization
Address

Cc: X X

Strategic communications plan

TABLE OF CONTENTS PAGE

STEP ONE: CONDUCT A SITUATION ANALYSIS
A. EXAMINE THE EXTERNAL ENVIRONMENT…….……. 3-4
B. EXAMINE THE INTERNAL ENVIRONMENT……..…. 5-6

STEP TWO: CONNECT WITH YOUR AUDIENCE
A. AUDIENCE IDENTIFICATION…….…….. 7
B. AUDIENCE PROFILE ……..……..……..…… 8-12
C. SELECT PRIORITY AUDIENCES ……. 13

STEP THREE: DEFINE COMMUNICATIONS OBJECTIVES……. 14-16

STEP FOUR: TAILOR MESSAGES……. 17-21

STEP FIVE: DEVELOP APPROPRIATE STRATEGIES AND VEHICLES… 22-27

STEP SIX: EVALUATE YOUR EFFORTS
A. STRATEGY FOR EVALUATION…….……... 28
B. DEVELOP OUTCOME MEASURES……..……..…….. 29-31

STEP SEVEN: CREATE A TIMELINE AND BUDGET
A. DEVELOP A CALENDAR…….. 32
B. COMMUNICATIONS BUDGET SHEET…….. 33

- **Do you have seniors or disabled people in your congregation?**
- **Are they looking to you to remain independent and at home?**
- **Know a senior choosing between medication, food and heat?**
- **Do older adults ask for your help?**
- **Are family caregivers looking to you and your staff for help?**

A Practical 1-Hour Workshop for

Church Ministers, Staff, & Volunteers

Services for older adults and the disabled are shrinking rapidly. Now, more than ever, people need to know what resources remain and how to access them. We will show you how in this free workshop.

- ✓ *Washington State is a pioneer for the single most powerful Internet tool available for older adults today – Benefits Check Up. This easy-to-use resource will help you give tangible help to seniors in your congregation.*
- ✓ *Pierce County provides one of the most active Senior Information & Assistance services in the country. Nearly 500 seniors call every month to inquire about local services and programs to help them continue to live fulfilling and independent lives in the community.*
- ✓ *We will introduce you to an innovative way to locate hundreds of available community resources in Pierce County for older adults and individuals with disabilities.*

INSERT DATE, TIMES, LOCATION

Workshop is free. Please RSVP to register. Seating is limited.
Complimentary snacks provided.
Call 798-3826 for information and reservations.

INSERT AGENCY LOGO AND NAME

We can come to you. Have a group that would benefit from knowing about local resources for older adults? Let us know and we can tailor a special presentation at your location.
Call 798-3826 to schedule.

Commissioners
Jimmy Dimora
Peter Lawson Jones
Tim McCormack

Granada Garden Residents

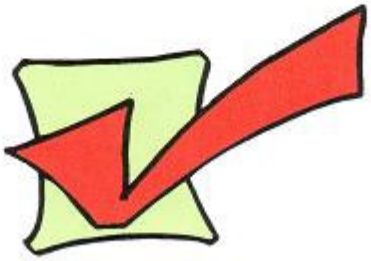
Here's a Check Up that Can Save You Money!

Brought to you by
The Department of Senior & Adult Services

Benefits Check Up is a fast, free, secure web site developed by the National Council on the Aging to help persons who are 55 years old and older or disabled.

Find out what money-saving public and private programs you may be eligible for: prescription drug assistance, property tax discounts, home energy assistance, employment services, volunteer opportunities, and much more.

Benefits Check Up volunteers will be in your lobby on Tuesday, May 11, 2004 from 10:00a.m. until 2:00p.m., learn what Benefits Check Up is all about. Come see what you might be missing.



Contributed by Cuyahoga Department of Senior & Adult Services

Here's a Check Up that Can Save You Money!

Brought to you by the Cuyahoga County Department of Senior & Adult Services

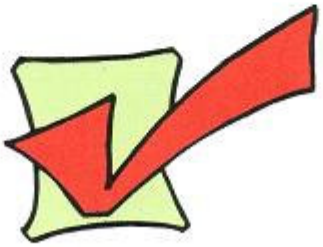
Benefits Check Up is a fast, free, secure web site developed by the National Council on the Aging to help seniors 55+, and the people who care about them.

Log on to:
www.benefitscheckup.org/link/cuyahoga and find out what money-saving public and private programs you may be eligible for: prescription drug assistance, property tax discounts, home energy assistance, employment services, volunteer opportunities, and much more:

- Complete the brief, confidential Benefits Check Up questionnaire. No need to enter name or social security number.
- Print out a customized report listing the programs you qualify for. The report will even tell you where to apply and what documentation to bring with you.

No computer? No problem. Call the Department of Senior and Adult Services at (216) 420-6840. You can be screened over the telephone or by mail.

Find out what you might be missing out on! Get your check up today!



Funding for Cuyahoga County Benefits Check Up has been made possible through the generosity of the Cleveland Foundation, and the Cuyahoga County Commissioners.

BenefitsCheckUp benefits seniors and those who care for them

- September 18, 2003 by Eileen Beal

When Betty Ferko, was laid-up with foot injuries that made it impossible for her to get out of her Cleveland apartment, she heard about all the services a blind friend had gotten through BenefitsCheckUp, and decided to give the on-line screening program a try.

BenefitsCheckUp is a web-based information and referral service for seniors and the physically challenged that is managed in the Cleveland area by the Cuyahoga County Department of Senior and Adult Services.

"I don't own a computer," explained the long-retired Cleveland resident, "but that didn?t matter. She [a Department of Senior and Adult Services program specialist] took my information by phone, which didn?t take more than half an hour. Then she told me the programs and things I was eligible for and mailed me the application information that I needed to fill out for each one."

About a month later, Ferko began participating in programs including food, phone, and utilities programs and Medicare and receiving services, including daily home health aide visits and twice-monthly visits from a Benjamin Rose social worker, for which she was eligible.

"Things didn't just arrive out of the blue," stressed Ferko. "I had to make a lot of phone calls to get things going, but if I hadn?t found out about the BenefitsCheckUp Program from my friend, I wouldn?t even have realized they were available, much less that I was entitled to them because of my situation."

BenefitsCheckUp (www.benefitscheckup.org) is an on-line search program designed by the National Council on Aging (NCOA) to help older Americans, their families and caregivers determine quickly and easily what government and community benefits they qualify for. Then it gives them detailed instructions (including in most cases, print-on-demand application forms) on how to apply for them.

The site has over 1,000 federal and Ohio programs, plus an additional 70 that are specific to the Cleveland-Cuyahoga County area, said Lynn Wieland, coordinator of the Cuyahoga County Department of Senior and Adult Services Office on Aging. "Before this program started," added the social worker-turned-administrator, "even social workers had trouble keeping up with all the programs that were available and how to qualify for them."

BenefitsCheckUp benefits seniors and those who care for them
"To get the kind of information that?s now available with a mouse click," she added, "seniors or their family members used to have to spend long hours on the phone or long hours in lines at local agencies."

Though it seems a bit daunting at first glance, the 40-item BenefitsCheckUp questionnaire is super-easy to use, whether you are inputting information directly into the web site using a home, library or senior center computer or calling the Cuyahoga County Department of Senior and Adult Services at 216-420-6840 and having one of the two program specialists do it for you.

"For the average person, it will probably take between 20-30 minutes to do the questionnaire on the web site," Wieland said. "It takes a little longer, we tend to ask questions to get more information if you call us to have someone here do it for you."

"Doing" the questionnaire means anonymously answering questions about your age, zip code, health status, veteran status, current expenses (i.e. mortgage/rent, utilities, out-of-pocket medical expenses, etc.), and financial situation (i.e. current assets, amount expected from retirement plans, etc.). Then, with a mouse click, the site brings up an on-screen list that identifies programs and services everything from local weatherization programs to Supplemental Security Income programs to volunteer programs that you might qualify for. Might is the operative term, stressed Wieland, because you will only know for sure that you do, or don't, qualify for a specific program when you actually fill out the application form and send it in.

BenefitsCheckUp has been so successful, since its launch in June of 2001 there have been well over one million visits to the site?that NCOA in January launched BenefitsCheckUpRx (www.benefitscheckuprx.com), a drug and medication site.

"Prescription drugs are by far the most pressing problem for seniors, and because its focus is discount and free drug and medication programs, it's the most-used section on the BenefitsCheckUp site," said Wieland. "Even people in the helping professions, physicians, social workers, case managers are using it."

Be Prepared:
BenefitsCheckUp and BenefitsCheckUpRx questionnaires are easier to fill out if you have the following information handy:

- Month and year of birth for the person for whom the questionnaire is being done
- State and zip code
- Type of residence (house, apartment, mobile home, etc.)
- Veteran status
- Employment history (especially with state, local, and federal governments or railroads)
- Current income and assets from all sources
- Current expenses (including housing costs and out-of-pocket medical expenditures)

For more information on programs or services that you or a loved one may be eligible for, visit the following sites:
www.phrma.org
www.needymeds.com
www.helpingpatients.org
http://best.ssa.gov
www.socialsecurity.gov

Helping Grantseekers Succeed

Since 1956, the Foundation Center has helped thousands of grantseekers find information about grantmakers and their funding interests. Whether you are looking for information on foundations or want to learn something about the grantseeking process, the Foundation Center can help you, too.

Visit Our Content-Rich Web Site at www.fdncenter.org

BENEFITSCHECKUP – Before You Begin

Many older adults like you are turning to BenefitsCheckUp to find out about the many services and programs available to them. This simple screening tool is completely anonymous. Confidentiality is paramount. The information you provide cannot be traced back to you. It asks for a variety of information about your circumstances and produces a report about the most helpful resources available based on your responses.

We've found that having the necessary information at your fingertips makes completing the questions easier. Here's a quick list of information you will need. If you are completing the survey for someone else (parent, friend or visitor) make sure that you have their correct information. Please come prepared.

Exact figures are not required for answering the financial questions. However, the more accurate the information you provide the more useful your report will be in identifying programs and services you are eligible to receive.

- State and ZIP code.
- Date of birth for self and spouse.
- Type of residence (house, apartment, or mobile home).
- Length of time in current residence.
- Household monthly, out-of-pocket costs for heating, gas, electricity, water, telephone, rent, and mortgage.
- Monthly out-of-pocket medical expenses including healthcare not covered by health insurance (medical equipment, drugs, doctor's fees, co-payments, transportation to doctors, home health attendant's fees, health insurance premiums and annual deductibles.
- Employment history (specifically, whether or not the person ever worked for the state, local, county, or federal government or the railroads) for self and spouse.
- Veteran's status for self and spouse.
- Names of prescription medications you are taking. (Bring the prescription bottles or information about your medications. Spelling is important.)
- Current income: ▸ Retirement Benefits, ▸ Dividends & Interest, ▸ TANF, ▸ Supplemental Security Income, ▸ Disability, ▸ Veteran's Benefits, ▸ Worker's Comp, ▸ Cash Assistance ▸ Work Income, ▸ Other Non-Work Income.
- Current assets: ▸ Cash, ▸ Value of Your Home and Automobiles, ▸ Retirement Accounts, ▸ Investment Accounts, ▸ Life Insurance (cash value and face value), ▸ Burial Accounts (revocable and irrevocable), ▸ other assets.

Council for Jewish Elderly presents...

There's No Place Like Home

Benefits Check*Up*

Please join us on one of the following dates:

March 3, 9:30 am	March 10, 9:30 am
Malibu Condominium	Park Tower
4th Floor Party Room	2nd Floor Party Room
XXX N Sheridan Rd	XXX N Sheridan Rd.

Please join us for this FREE program

Are you eligible for benefits? Would you like to learn how to apply for them? The Benefits Check*Up* can help! Everyone who attends will receive a personalized print out of city, state, and federal benefits. Individual follow-up appointments will be available throughout the month.

If you have questions or would like more information, please call XX at xxx-xxx-xxxx.

Benefits Check Up Program – Group Presentation

Outline: **Introduction**
BCU Background
Filling Out the Form
Sending out the results

Introduction of agency and staff backgrounds of presenters

BCU Background

- The BenefitsCheckUp is the nation's most comprehensive online service to screen for federal, state and some local private and public benefits for older adults (ages 55 and over). It contains over 1,150 different programs from all fifty states (including the District of Columbia). On average there are 50 to 70 programs available to individuals per state.

  In addition to identifying the programs that a person may be eligible to receive, BenefitsCheckUp also provides a detailed description of the programs, local contacts for additional information (typically the addresses and phone numbers of where to apply for the programs), and materials to help successfully apply for each program.

- BenefitsCheckUp was developed to address a concerning problem: millions of older adults are eligible for benefits, but not receiving them. Ranging from health coverage to supplemental income to help in paying utility bills, there are millions of older adults who could benefit from a wide array of public programs if they knew about them and how to apply for them.

About NCOA and the national sponsors:

- The National Council on the Aging is a national, nonprofit group of people and organizations dedicated to promoting the dignity, independance, well-being, and contributions of older people. We've been around since 1950 and over the years, we have helped develop Meals-on-Wheels, Foster Grandparents and dozens of other innovative programs for older Americans.

- NCOA believes that benefits are important and useful tools to help seniors be independent and healthy. NCOA is proud to work with national sponsors and government agencies to make this service free to anyone who wants to see if they may be eligible for public programs and services.

SPONSORS & PARTNERS

Filling Out the Form

- Line by line filling out of the form

Results

- Results will be mailed to your home
- Each program you are eligible for will have information about how to apply for the benefit
- IF YOU ARE INTERESTED IN 1:1 HELP, appointments with presenters are available.

Feedback? Comments? Questions?

The Foundation to Benefit Our Seniors

TO: Staff Answering Help Line
FROM: XX
DATE: XX
RE: Cheat Sheet for Programs

Below are the state issued guidelines for the programs we are helping our clients with enrollment.

Medicare Savings Program (MSP)

- Maximum monthly income – single = $1068; married = $1426
- Includes TOTAL income from ALL SOURCES
- Asset Test – single = $4,000 total cash assets; married = $6,000
- Assets NOT counted include primary residence, 1 car, burial plots and face value of life insurance.

Property Tax Rent Rebate

We will not be mailing applications for 2004 rebate until May.

- Must be homeowner of record and paid taxes in 2004 or renter
- Renter's landlord must be subject to property tax
- Total income not more than $15,000 (however only ½ of SSA and RRA income is counted)

PACE/PNET

- Must be age 65+
- PA resident at least 90 days
- Income limits:

PACE	**PNet**
Single = $14,500	$23,500
Married = $17,700	$31,500
THERE IS NO ASSET TEST	

See XX with any questions.

There's No Place Like Home!

Thank you for attending the Benefits Check*Up* program! Enclosed is your personalized printout of benefits. We hope you find it helpful.

Please review the programs carefully and at your leisure. Some of the programs you might already have and some of the benefits you might not have ever heard of! Program eligibility varies, and results are based on the information you provided. If your situation changes in the future and you would like to have an updated screening completed, it would be our pleasure to assist you.

There's No Place Like Home is committed to helping you connect to benefits and answer your questions. Do not hesitate to call us at any time to make a confidential appointment or to ask a question, quick or complicated, at xxx-xxx-xxxx.

Sincerely,

XX	*XX*	*XX*
Program Manager	*Resource Specialist*	*Social Worker*

Month Date, Year

Dear Consumer

As requested, attached are your results of the BenefitsCheckUp information you provided to COSA. We hope this information is helpful to you and your family in securing additional government benefits for which you are eligible. **You will need to contact the various agencies directly to enroll in their specific programs**.

If you have any additional questions, feel free to contact our office at xxx-xxx-xxxx. Ask for the Information & Assistance Unit.

Sincerely,

xx, MSW
Program Director,
Communications & Consumer Services

Enclosures

BenefitsCheckUp
Client Follow-Up Form

Name: _____ Telephone: _____

Date of call: _____ _____ _____
(Note all attempts: NA = no answer, B = busy, LM = Left Message)

☐ No answer ☐ Disconnect ☐ Number Incorrect ☐ Moved

"I am calling to follow up on a Benefits Checkup report that was done for you earlier this year. Did you receive your report? I would like to ask you some questions to find out if this report was helpful.

Benefit	Applied For?	If not, why Not?	Received?	If Denied, Why?	Estimated Savings?
Social Security					
Social Security Disability					
SSI					
SSI Disability					
Veterans' Pension					
Veterans' Disability					
Homestead – Taxes					
Medicare					
QMB (Medicaid)					
SLMB (Medicaid)					
Veterans' Medical					
Passport					
Food Stamps					
L I HEAP					
Weatherization					
Lifeline Telephone					$12.38
Employment - WIA					
Employment - SCSEP					
OPTIONS					
Homestead Water					

Possible Answers

N = Never
I = Lack of Interest/Changed mind
U = Didn't understand report
T = Lack of transportation
E = Escort, needed companion
D = Lack of documentation
DN = Didn't need
TD = Too degrading/embarrassed
L = Did not want to go to service center
H = Have benefit already
OI = Over income limits
OA = Over assets
O = Other

Benefit - Description	Applied for?	If not, why not?	Received?	If denied, why?	Estimated Savings
Prescription Help					
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

Possible Answers

N = Never
I = Lack of Interest/Changed mind
U = Didn't understand report
T = Lack of transportation
E = Escort, needed companion
D = Lack of documentation
DN = Didn't need
TD = Too degrading/embarrassed
L = Did not want to go to service center
H = Have benefit already
OI = Over income limits
OA = Over assets
O = Other

Comments:

_____
_____
_____
_____
_____
_____

For internal use. Record resolution of call:

☐ Rescreened
☐ Sent information/application on program(s)
☐ Arranged for call backs form other organizations. List:_____
☐ Assisted with completion of forms
☐ Referred to: _____
☐ Assisted client in obtaining documentation
☐ Arranged for further follow up contact. Date:_____

BCUFU Form 2
Rev. 5/31/05