Financials/Benefits and Entitlements

Client ID: _____   **Client Name:** _____

Date: _____   **Worker Name:** _____

Veteran Status:

Are you a Veteran?   [ ] No   [ ] Yes

Are you a disabled Veteran?   [ ] No   [ ] Yes

Are you the spouse of a Veteran? [ ] No   [ ] Yes

Comments:

Living Expenses:

Expense Type:	Monthly Expenses ($):
Mortgage:	
Maintenance/Common Charges:	
Rent:	
Electric/Gas/Oil:	
Phone:	
Water:	
Co-pay:	
Deductibles:	
Prescriptions;	
Out-of-Pocket Home Care Expenses:	
Other Medical:	
Health Insurance Premium:	
Prescription Insurance Premium:	
Other Medical Insurance:	
Income	
Property	
Other Taxes	
Other (describe in Comment box)	

Comments:

Income & Resources

Income/Resource Type:	Monthly Income ($):
Social Security (net):	
SSI:	
Personal Retirement Income:	
Interest:	
Dividends:	
Salary/Wages:	
Other Income:	

Comments:

Assets/Resources:

Assets/Resources Type:	Total Value ($):
Checking:	
Savings:	
Life Insurance (cash value):	
Life Insurance (face value):	
Stocks, Bonds, Mutual Funds:	
Real Property:	
IRA:	
Pension:	
Other:	

Comments:

Benefits and Entitlements Status

Client refuses to apply for any benefits and entitlements at this time: [ ] No [ ] Yes

Benefit/Entitlement Type:	Application Status:			
EPIC:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Medicare:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Food Stamps:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Public Assistance:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
SLIMB:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
IT 214:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Aged STAR Exemption:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Real Property Tax Exemption:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Railroad Retirement:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
SSD:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
VA Benefits:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible

Benefit/Entitlement Type:	Application Status:			
Section 8 Housing:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Lifeline/PERS:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Health Insurance:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
LTC Insurance	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Medigap Insurance/HMO:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Medicaid:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
QMB:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
HEAP:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Telephone Discount:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Veteran Tax Exemption:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Social Security:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
SSI:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Reverse Mortgage:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible

Benefit/Entitlement Type:	Application Status:			
Cable Discount:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
SCRIE:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Private Health Insurance:	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible
Access-A-Ride	[ ] Application Pending [ ] Has Benefit [ ] Refuses to Apply	[ ] Denied [ ] May be Eligible	[ ] Does Not Have [ ] Not Applicable	[ ] Does Not Need [ ] Not Eligible

Comments:

Client received assistance from this agency with a benefits and entitlements application: [ ] No   [ ] Yes

Client now receives a benefit and/or entitlement as a result of the assistance received from this agency: [ ] No   [ ] Yes