

PROMISING PRACTICE TIPS: SYSTEM FOR PROVIDING COMPREHENSIVE ELIGIBILITY INFORMATION



This promising practice tip sheet focuses on resources to help Information & Referral/Assistance (I&R/A) Specialists connect clients to benefits, such as the Medicare low-income subsidies, SNAP (the Supplemental Nutrition Assistance Program), and LIHEAP (the Low-Income Home Energy Assistance Program).

The purpose of this promising practice tip sheet is to share information about tools that agencies are using, their experiences using those tools, and considerations for other agencies interested in using similar resources.

Connecting Clients to Benefits Using a Resource Folder System

The Ability Center of Greater Toledo is a Center for Independent Living (CIL) that serves seven counties in northwestern Ohio. The agency provides a variety of programs and services, including information and referral

The Ability Center's comprehensive resource folder system has proven helpful to the agency's staff and consumers for many years. This system is beneficial because it is:

- Available to all agency staff, in addition to I&R;
- Comprehensive and categorized based on consumer needs and requests;
- A system that houses helpful documents; and
- A mechanism that ensures consumers are provided with benefits-related information, including, but not limited to, applications, brochures, and eligibility information.

to connect individuals with disabilities to benefits to help meet their needs. As tends to be the case with many I&R agencies, when individuals call the Ability Center for help, they call about one issue. However, through the I&R process, I&R Specialists often identify more than one issue that the individual is dealing with.

To connect people to the benefits that can best meet their multiple needs, the Ability Center uses a robust resource folder system to house comprehensive eligibility information for benefits. The resource folders include eligibility information and resources that can help connect clients with benefits to assist with a variety of needs such as housing, energy assistance, health insurance, and food assistance.

How Does the Ability Center's Folder System Work?

The resource folder system is within the Ability Center's common drive on the agency's server. All staff, in addition to I&R staff, are able to access the folder system. Therefore, all programs at the Ability Center benefit from being able to readily access information that can help their consumers.

A Sample of the resource folders that the Ability Center uses to house comprehensive eligibility information and documents.

Name	Date modified	Type	Size
Homeless	6/26/2018 9:01 AM	File folder	
Hospice	6/26/2018 9:04 AM	File folder	
Housekeeping	10/15/2018 2:22 PM	File folder	
Housing	10/30/2018 9:57 AM	File folder	
IL Skills Help	6/27/2018 10:20 AM	File folder	
ILA	7/18/2018 3:35 PM	File folder	
Incontinence	1/12/2018 11:09 AM	File folder	
Lawn Assistance Program	8/21/2018 4:01 PM	File folder	
Learning Disabilities	6/27/2018 3:43 PM	File folder	
Legal	10/22/2018 8:45 AM	File folder	
Life preparation and dignity of work	5/30/2017 3:40 PM	File folder	
Lucas County	11/27/2017 1:46 PM	File folder	
Lucas County Board of DD Staff	11/16/2017 11:58	File folder	
Lucas County Jobs and Family	11/8/2016 1:18 PM	File folder	
Medicaid	7/25/2018 4:21 PM	File folder	
Medical	6/28/2018 10:34 AM	File folder	
Medical Clinics	7/26/2018 2:49 PM	File folder	
Medicare Part D Drug Plan	6/28/2018 10:36 AM	File folder	
Medicare_Medicaid	6/28/2018 10:39 AM	File folder	
Medication Coverage and Assistance	11/8/2016 1:18 PM	File folder	
Medication Set-up Services	9/6/2017 3:49 PM	File folder	
Mental Health	9/24/2018 11:44 AM	File folder	
Moving and Packing	10/18/2018 2:22 PM	File folder	
New folder	1/23/2018 2:11 PM	File folder	
Nursing Facilities	6/28/2018 12:16 PM	File folder	
Options for Tomorrow	11/8/2016 1:18 PM	File folder	
Other County Resources	12/1/2016 2:09 PM	File folder	
PASSPORT services	7/24/2018 2:09 PM	File folder	
Pets	11/8/2016 1:18 PM	File folder	
Physician Info	8/4/2017 1:23 PM	File folder	
Poverty Guidelines	11/8/2016 1:18 PM	File folder	
Prescriptions	11/8/2016 1:18 PM	File folder	
Promedica advisory group	1/31/2018 8:36 AM	File folder	
Property Issues	10/24/2017 1:37 PM	File folder	
Ramps	9/20/2018 3:38 PM	File folder	
Rent Assistance	11/8/2016 1:18 PM	File folder	
Rental Properties	11/8/2016 1:18 PM	File folder	

142 items

The resource folder system is categorized based on consumer needs and requests. Within each benefits-related folder, there are files such as documents with eligibility criteria, informational brochures, and applications. There are 142 folders that contain eligibility information and resources about benefits that consumers call about.

While the agency cannot guarantee approval of benefits, they can ensure that all consumers are provided with some information that is helpful to their situation. Once the needs of callers are identified, I&R Specialists have access to eligibility information and documents that are helpful to each consumer's situation. The categorical system is especially helpful when a consumer needs support with more than one issue. Specialists can readily print out applications and resources for consumers, as well as email documents and resources to consumers. Since each folder includes the necessary benefits-related information, I&R Specialists ensure that individuals do not walk away empty-handed.

What Does an Agency Need to Set Up a Folder System?

To set up a folder system similar to the Ability Center's, an agency would need a common drive or other type of file sharing mechanism that everyone within the I&R department and organization could access on their computers. A system for categorization of benefits would need to be developed. A categorization system could also be adopted or adapted from an existing system. Finally, eligibility information, resources, and documents for each benefit would need to be saved to the folders, and staff would need to be trained on how to use the system and trained on a process for keeping it updated.

The Ability Center shared that one of the keys to making this system work is to always be on the lookout for new resources and updates. Client needs help to drive the identification of resources, and it is important to be aware of what is available to share with consumers.

FOR MORE INFORMATION:

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