

# **Top 5 Reasons VA Pension Benefit Clients Don't Move Forwards**

**1) The Home Care Agency did their in-home assessment over the phone instead of in person.** There is no trust between the client and the Home Care Agency. NOTE: You can ask the initial 8 questions over the phone but you MUST follow up in person after that point to build a relationship of trust and have the client sign the Release Forms - allowing us to speak with them about the VA Benefit.

**2) The Home Care Agency put inaccurate contact information in the referral form -** meaning our VA Team cannot contact the Primary Point of Contact.

**3) The family has no intention of having a caregiver in their home.** This occurs when a home care agency did not do a proper in-home assessment to assess the needs of the potential client and see if they are open to having an aide come to their home part-time. Also, sometimes the family wants to use their family member as the caregiver. This is never a good idea as the family usually wants to cut out the home care agency down the road.

**4) The family is confused after talking with the home care agency -** as the home care agency started talking off script about "benefit eligibility" requirements, telling them they will qualify for \$2,200 per month (when they are a surviving spouse who qualifies for only \$1,200), and telling them they will never have to spend any money out of their own pocket (which may not be true if their income is too high and they need to spend some funds out of their own pocket to bring down their income). You should always tell them: "There is no charge for Care Planning Institute's Services" and leave the rest to our accredited team.

**NOTE:** The Home Care Agency should only ask the 8 Questions in the Client Release Forms document and show the PowerPoint Presentation. If the potential client "passes" those 8 questions then you do the VA Pension Benefit PowerPoint Presentation with them and have them sign the Client Release Forms. Scan the forms they sign and send in the referral via our website – it is that simple! Our team will take it from there and this will help ensure your clients do not say "I was told by the agency that..." which was not accurate – and now they are suspicious of scams. Keep in mind that you are not an Accredited VA Benefit Agent and therefore not legally allowed to give people advice on how to apply for VA Benefits (outside of basic information available on the VA Website that is located in the materials we have given you).

**5) The Home Care Agency does not build a relationship of trust with the client -** which leads to the client not calling us back after we initially reach out to them OR flakes during the process of us gathering their paperwork as the home care agency has not maintained any contact with them after their initial meeting to sign the Client Release Forms.

**NOTE:** the only two documents you need to be concerned with are attached. These documents have the forms the clients need to sign in order for us to start talking to them and also the 8 questions you need to ask them to pre-qualify them.