

Care Planning Institute

VA Aid & Attendance Benefit Program



Five Easy Steps To Help Your Client Get The VA Aid & Attendance Benefit

Step One

Whenever you encounter a Veteran, spouse of a Veteran, or surviving spouse of a Veteran who is over age 65 and seems to need some assistance at home with activities of daily living, you should let them know about the VA Pension with Aid & Attendance Benefit. Meet with them in their home and review the "8 Questions" and then present the "VA Benefit PowerPoint Presentation." The benefit applicant's family member/responsible party must be present. If the benefit applicant would like to have extra funds to pay for their care services and would like to apply for the benefit then continue to the next step.

Step Two

Have the benefit applicant and family member sign the Release Documents and follow the instructions on the Client Letter. Scan the documents to PDF. **You will need to use a quality scanner to scan documents.** The "CamScanner" app can scan documents using your phone for free. Then go to www.careplanninginstitute.org/contact and fill out the referral submission page and upload the scanned documents. This will immediately send the referral to our Accredited VA Benefit Agents. Be sure to leave the Client Introduction Letter and let the client and the family member coordinating their care know that Care Planning Institute's Veterans Benefit Team will be calling them within 1-2 business days to perform benefit pre-qualification. This step is important as if the family member is not expecting a phone call from Care Planning Institute (CPI) they may never answer CPI's calls. After talking to the client, CPI will call your agency and let you know if the client will likely qualify for the benefit or not.

Step Three

Care Planning Institute will work with your client to help them gather all the necessary paperwork, sign service agreements, etc. to move forward and get their benefit application put together. The usual period for the application to get put together is 4-6 weeks - due to waiting on the military discharge document that must be received from the St. Louis Military Archives Office. A week or so before the application goes to the VA, CPI will call the agency and let them know the amount of benefit the applicant is eligible to receive and the date of benefit eligibility. The agency will usually have one week or more to perform their standard in-home assessment and designate a caregiver. The agency will discuss the hours of care and schedule with the client during the in-home assessment.

Step Four

Care starts, and the application goes out to the VA. The home care agency provides one month of care, submits their "Monthly Care Report" to CPI by the 5th of the following month, and then gets paid net 30 days. The home care agency will need to have enough payroll funds to cover the first 30 days until they get paid by CPI. The home care agency will continue to provide care to the client each month ongoing and get paid net 30 days by CPI. If the client is using the CPI Veterans Appreciation Loan, these funds will be used to pay for their care during the benefit application approval period.

Step Five

Once the client gets approved for the VA Benefit, the VA pays the client for the months of benefit accrued during the benefit application period in one lump sum. If the client is using the Care Loan, the loan is then paid back with the lump sum benefit payment the client will receive from the VA. The client continues to receive a monthly benefit payment from the VA if they stay eligible for the benefit. The client continues to receive care services so they can stay compliant with the benefit requirements. CPI continues to bill the client month to month and pay the home care agency net 30 days.

- (877) 487-8166
- careplanninginstitute.org/contact

Billing & Payments

Billing & Case Management Fees

CPI provides an interest free, no fees, care loan to qualified clients to allow them to start care services without spending funds out of their own pockets. CPI collects payment on the loan once the client is approved for the VA Benefit and gets paid by the VA. CPI continues to provide billing and collection services each month ongoing and pays the home care agency net 30 days (i.e. the agency gets paid 30 days after they submit their Monthly Care Report). CPI guarantees the Agency will be paid in full for all their Client Care Reports whether or not their Client pays their bill.

Monthly Care Report Deadlines & Penalties

All Monthly Care Reports must be submitted to billing@careplanninginstitute.org by end of business day Pacific Time on the 5th of each month. Monthly Care Reports not submitted by the 6th day of each month will incur a 3% penalty. Keeping our Veteran clients happy is of utmost importance to CPI. Billing clients late can lead to clients spending their VA Benefit on other things because they think they have been billed already and have extra funds left over.

Marketing

Educate Your Community About The VA Benefit

Educating your community about this little-known VA Pension with Aid & Attendance Benefit is key. There are many Veterans and surviving spouses of Veterans who could qualify but do not know about this benefit. We have a PowerPoint presentation that you can use to educate your community. As you market to your existing/potential referral sources you can finish your conversation with:

"Hi, we have a Veterans Help At Home Program for elderly veterans and their spouses. Are you discharging any Veterans or Spouses of Veterans over age 65 this week? Ok, well could you do your elderly patients a favor and ask them if they are a Veteran or spouse of a Veteran when you discharge them – as I may be able to help them get \$2,200 per month to help pay for an aide to come into their home after discharge to help them stay safe at home and stay compliant with their plan of care. Our goal is to help them stay home once they get discharged and not have to come back to the ER. Could you ask them if they are a Veteran or spouse of a Veteran, and if they say 'yes' then could you give me a call and I'll drop by here and come and talk to them about how to get those funds. Could you do that?"

Agency Protected Territory

To maintain their protected territory, an Agency just needs to educate their community about the VA benefit and send in referrals of people who would like to apply for it. To sign up with our CPI VA Program, an Agency needs to review and sign/complete our CPI Service Agreement, ACH Billing Form, and form W-9. There are no sign up or on-boarding fees.

Questions?

Please send all questions regarding becoming a VA Program Provider to our VA Benefit Group at provider@careplanninginstitute.org. You can also reach our team at the below phone number.

- ☐ (877) 487-8166
- ☐ careplanninginstitute.org/contact