



## **In Order To Start Using Our Veteran's Program You Need To Do The Following:**

1. Do the VA Orientation via going to [www.careplanninginstitute.org/veterans1](http://www.careplanninginstitute.org/veterans1) Password: irvine23 Then, email us at [va@careplanninginstitute.org](mailto:va@careplanninginstitute.org) to request your hourly rate: Send us your private pay hourly rate for a 4-6 hour shift as well as your office address.
2. Download the VA Benefit Presentation that you will show to potential benefit applicants and their family during their in-home assessment (located in the below Zip file).
3. Download the Zip file with the documents to sign up with our VA Program. [Click Here](#). Password: irvine23 Then sign, scan, and email the documents back to us at [va@careplanninginstitute.org](mailto:va@careplanninginstitute.org). **NOTE:** Sometimes McAfee Anti-virus sends virus alert warnings when users attempt to download "zip" files. Rest assured there are no viruses in the zip file you will download. You can download the files and then run McAfee to scan the files and it will show no viruses or malware.
4. Once we get the signed Service Agreement, W-9, ACH Form, and ESign Form, from you we will confirm receipt and let you know to start marketing the benefit to your community.
5. If you would like our vendor to create a tri-fold VA Benefit brochure for your agency - it costs \$50 to create the printable PDF. You can then have 1,000 of them printed for \$185 using a 3rd party print vendor (gotprint.com). The forms to request such are in the zip file you downloaded in step 3 above.

## **To Submit A VA Benefit Referral:**

1. Do an in-home assessment with the potential client and their responsible party/family member. Review the "8 Questions" and go through the VA PowerPoint presentation.
2. Then have the applicant AND point of contact sign the "Client Release Documents\_For Signature." The "8 Questions" are located at the beginning of the Client Release document. Scan their signed documents with your phone using the free "CamScanner" app.
3. Go to [www.careplanninginstitute.org/contact](http://www.careplanninginstitute.org/contact) to submit a referral online at our website. You **MUST** upload your scanned Client's signed On-boarding and Release documents to submit the referral. **Be sure to tell the client's point of contact family member/friend** that Care Planning Institute Veterans Benefit Team will be calling them in 1-2 business days so they are expecting our call!
4. **NOTE:** We do not provide loans to applicants who are terminally ill with less than one year to live. If the applicant passes away before their benefit is approved the family would need to pay for all of their care as the VA is not likely to pay out any benefit to a person who has passed away. If the family still wants to apply for the benefit, they can, but would need to private pay for their care during the application process - as they will not qualify for our interest free loan. We discuss all of this with the client when we do their "intake".