



Successful Partnerships

How Arizona Uses BenefitsCheckUp to Screen Seniors for Eligible Benefits



Governor Janet Napolitano

Many older people need help paying for prescription drugs, health care, utilities and other basic needs. Ironically, millions of older Americans – especially those with limited incomes – are eligible for but not receiving benefits from existing federal, state and local programs. Ranging from heating and energy assistance to prescription savings programs to income supplements, there are many public programs available to seniors in need if they only knew about them and how to apply for them.

Thanks to BenefitsCheckUp®, help is available for seniors and those who care about them. Launched by the National Council on Aging (NCOA) in 2001, BenefitsCheckUp® is the nation's most comprehensive Web-based service to screen for some 1,550 benefits programs available to those 55 and over.

BenefitsCheckUp Arizona – A Unique Partnership

BenefitsCheckUp Arizona is a unique partnership between local foundations and funders and the Governor's Office for Children, Youth and Families (GOCYF). This project uses a version of BenefitsCheckUp that is licensed to the state to screen Arizona's seniors and adults with disabilities for an array of public and private benefits. The goal is to determine if they are receiving all the benefits for which they are eligible and to assist them (and those who care about them) in applying for benefits.

Recruiting Local Providers and Agencies

BenefitsCheckUp Arizona began in the spring of 2004 as a pilot project. The state established Advisory Committees, inviting local providers of services to the aging to assist with the implementation of the project in their county. They identified social service agencies, faith-based organizations, senior centers, and other groups potentially interested in becoming Organizational Edition sites (screening sites) for BenefitsCheckUp Arizona.

Today, over 100 screening sites throughout Arizona have been set up in each of the 15 Arizona counties. Areas for future growth include expanding a strong volunteer component and solidifying the follow-up process for clients who have been screened.

Marketing, Training and Follow-Up: Keys to Success

Marketing and training have been key to the success of BenefitsCheckUp Arizona. The state developed various marketing materials including: brochures and posters, a training video, two 30-second television commercials, Public Service Announcements, and print media. Once local screening sites were set up, there were trainings coupled with community outreach strategies to inform various social service agencies of the project.

Another key to success is follow-up. Once an individual has been screened, follow-up is essential, to ensure that the client actually receives the benefits for which they were screened. This program uses the BenefitsCheckUp OE follow-up and tracking tool that allows staff to report on a quarterly basis what benefits clients have received.

BenefitsCheckUp Improves the Lives of Older Arizonans

As of August 2007, over \$125 million in benefits have been identified for seniors in the state. BenefitsCheckUp Arizona enhances economic development because seniors receive more of the benefits for which they are eligible, so they have more money to spend on household needs or other activities. BenefitsCheckUp Arizona is a model for how a partnership with government can innovate positive systematic change to benefit citizens.

Partnering with BenefitsCheckUp

To discuss partnership opportunities with BenefitsCheckUp,

contact: S. Stuart Spector
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BenefitsCheckUp Organizational Edition (OE)

BenefitsCheckUp OE is an online decision-support and enrollment tool that helps agencies screen seniors with limited income and resources for over 1,550 public and private benefits including:

- Prescription drugs
- Heating bills
- Rent
- Meal services and nutrition
- Legal matters
- Medical costs
- Property tax rebates
- Veteran's benefits
- Alzheimer's care

It can also help you find:

- Answers to Social Security questions
- Job opportunities
- Programs for the deaf and hard of hearing
- Volunteer work

And gives agencies:

- Single-page screenings and printable screening questionnaires for enrollment events, mailing and pre-screening
- Over 250 Rx program application forms -searchable by drug or program name
- Ability to track clients' application and enrollment in benefits
- Reports that document the number of clients screened, their demographics and the programs for which they are eligible
- Training and Support