

Date:

Dear

This letter is to confirm our appointment with you has been scheduled for  
. **This meeting will take place at your home.**

UPCAP is a private, non-profit care management agency. Care Management is a service designed to assess and assist with the long-term care needs of the elderly and/or adults with disabilities. The Care Management team consists of a registered nurse and a social worker. The assessment will take approximately one and a half to two hours to complete. We strongly encourage you to ask a family member or friend to be present during the assessment.

The Care Management team will be contacting you the afternoon prior to **OR** the morning of the scheduled appointment, listed above, to confirm availability and continued interest. The Care Management team must receive verbal confirmation from you or your representative. If they are not able to receive confirmation prior to the scheduled appointment, it will be canceled and will need to be rescheduled.

\*If you are interested in enrollment into UPCAP's **Federal Home and Community Based Services for the Elderly and Disabled Waiver Program**, the care managers will need to **verify** all of the financial information you provide to them. (See page 3)

The "Waiver" Program can assist in purchasing the services you will need. In addition to the assessment eligibility requirements, there are **income** and **asset limits** you must meet in order to be eligible for this program.

A **single person** can have **no more than \$2,000.00 in assets** meaning savings, checking, CD's, stocks, bonds, property other than your home, etc.

A **married couple** can have no more than **\$32,828.00** in assets.

The person requesting the waiver program (regardless of marital status) can have no more than **\$2,829.00 in gross monthly income**, meaning income before insurance premiums and other deductions are taken. Types of income include social security payments, pensions, interest from investments, wages, etc. (*Note: a spouse's income is not counted*).

**If you do not meet these guidelines and are 60 years of age or older UPCAP's Care Management program can still offer the following services and assistance:**

- We can assist in arranging services to help you remain safely in your own home.
- We can continue to monitor the services to assure they are meeting your needs.
- We can assist you with resolving issues with providers of services.
- We can make recommendations for needed services or medical equipment that could prevent nursing home placement.
- Explore alternative funding for services, housing, home repair, or home modifications.
- Assess and reassess health issues-reporting to your Physician, if necessary.
- Develop an emergency plan
- Assist with Medicaid application and spend down
- Be another contact or support for isolated clients or those with limited informal supports
- Develop a plan of care.
- Enrollment in Care Management provides priority status for grant-funded services you may need and want

\*Our Care Managers will explain in much greater detail all of the eligibility requirements at the time of the assessment and will provide you with a written "Program Explanation" about Care Management and the Waiver Program.

Please feel free to call \_\_\_\_\_ with any questions or concerns you may have, or if you are unable to meet as planned at the time noted above.

Sincerely,

**For those seeking assistance in paying for needed home care services only.**

In order to hasten the process of applying you to the Waiver program, it would be very helpful if you could have the following information available at the time of assessment.

**INCOME**

Pension  
(Work, Social Security,  
Veterans, Railroad)  
Rental Income  
Any other source of income

**ASSETS**

Checking Acct.  
Savings Acct.  
Life Insurance  
Burial Accounts  
CD's  
Stocks  
Bonds  
Trusts  
Annuities  
Property Deeds  
Vehicle Title or Registration  
Retirement Accounts

**EXPENSES**

Rent  
Loan Payments  
Insurance Premiums  
(Health, Life, Car &  
Homeowners)  
Property Tax Statement

**CARDS**

Social Security  
Medicare  
Medicaid (if applicable)  
Health Insurance  
Birth Certificates

**Please remember that this information is only necessary if you want UPCAP to assist you with paying for the cost of the home care services you may need.**