

Charities That Help Seniors: Quick Start Toolkit

Use this toolkit to organize calls, paperwork, and follow-ups for the most common senior needs: food, housing, utilities, healthcare, and prescriptions.

1) Quick Action Plan (First 72 Hours)

Today

- ☐ Call 211 for local food, shelter, utility help
- ☐ If a medical emergency: call 911
- ☐ If shutoff/eviction notice: gather the notice + lease
- ☐ Ask for caseworker or intake appointment

Next 2-3 days

- ☐ Apply to 2-3 programs at once (food + utilities + benefits)
- ☐ Call your Area Agency on Aging for referrals
- ☐ Ask about waitlists and required documents
- ☐ Write down confirmation numbers and names

This week

- ☐ Submit benefits applications (SNAP, MSP, Extra Help)
- ☐ Start housing waitlists (senior apartments, Section 8)
- ☐ Request medical equipment loans if needed
- ☐ Schedule follow-up calls

2) Emergency Contacts (Fill In)

211 (local assistance): 2-1-1
Eldercare Locator: 1-800-677-1116
HUD Housing Counseling: 1-800-569-4287
NFCC Credit Counseling: 1-800-388-2227

Your local contacts:

Area Agency on Aging (AAA) phone:

Local food pantry/food bank:

Utility provider hardship line:

Pharmacy/plan member services:

Documents to Gather + Call Script

3) Documents Most Programs Ask For

Identity & Age

- ☐ Photo ID
- ☐ Proof of age (if not on ID)
- ☐ Social Security number

Income

- ☐ Social Security award letter / benefit letter
- ☐ Pension statement
- ☐ Pay stubs (if working)
- ☐ Bank statement (sometimes)

Housing

- ☐ Lease or mortgage statement
- ☐ Proof of address (utility bill or mail)
- ☐ Eviction notice or rent ledger (if applicable)

Bills & Notices

- ☐ Utility bill + shutoff notice
- ☐ Medical bills (if requesting help)
- ☐ Prescription list (name + dose + pharmacy)

4) Phone Call Script (Copy and Use)

- ☐ Hello, my name is _____. I am calling to ask about assistance for (rent / utilities / food / dental / prescriptions).
- ☐ I am age ____ and live in (city, ZIP). I can provide ID, proof of income, and the bill/notice.
- ☐ What programs do you have right now, and what are the eligibility requirements?
- ☐ Is there an application today? If yes, can you tell me exactly what documents you need and where to send them?
- ☐ Are there waitlists? If yes, how long and how do I confirm my spot?
- ☐ Can you provide a confirmation number, and what is the best date/time to follow up?

Application & Follow-Up Tracker

5) Track Your Applications (Fill In)

| Program / Organization | Phone | What you need | Status | Follow-up date |
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Notes

Benefits & Savings Quick Screen

6) Check What You Might Qualify For (Ask About Each)

- ☐ **SNAP (food benefits)**
Monthly grocery benefits; may also qualify for senior pantry programs.
- ☐ **Medicare Savings Programs (MSP)**
Helps pay Part B premium and may reduce copays.
- ☐ **Extra Help (Part D LIS)**
Lowers prescription premiums and copays.
- ☐ **LIHEAP / utility assistance**
Help with heating/cooling bills; may prevent shutoffs.
- ☐ **Meals on Wheels**
Home-delivered meals if homebound.
- ☐ **CSFP Senior Food Boxes**
Monthly USDA food package for adults 60+ in participating areas.
- ☐ **Medicaid (or dual eligibility)**
Expanded help with healthcare costs for very limited income/assets.

7) Medication List (Bring to Calls)

Write each medication name, dose, and your pharmacy (or attach a printout).

| Medication name | Dose / directions | Pharmacy | Notes (prior auth, cost, etc.) |
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