

## 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)

## 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.)

**More guides:** [grantsforseniors.org/charities-that-help-seniors/](https://grantsforseniors.org/charities-that-help-seniors/)