

😊 Job Aid: Considerations for Scheduling and Benefit Issuance

Chapter 3: Client Processes

Section 11: Family Summary Screen

Lesson: Family Summary Screen

When deciding how many months of benefits to issue and what to schedule, consider the following things.

First Consider:

- ❑ What are the cert period start and end dates for all family members?
- ❑ Are there recertifications due in the next 3 months?
- ❑ Are there any limitations to the number of months of benefits you can issue?
(e.g. proofs pending, medical documentation required)

Then Consider:

- ❑ Are there any limitations indicated from your agency's policy? (e.g. pumps due, compliance issues)
- ❑ Are there any high risk participants in the family?
- ❑ What are the nutrition education needs of the family members, starting with the highest priority participant?
- ❑ What nutrition education is available in the participant's clinic?
- ❑ When and where would the participant prefer to attend nutrition education?
- ❑ What nutrition education choice is the participant's preference?
- ❑ Are there adequate appointments or requests to cover all family cert periods and ensure that they get benefits issued when needed?