BCS Volunteer News
March 15, 2011

The last issue of ***BCS Volunteer News*** included a review of best practices for interviewing applicants. This issue covers a more challenging part of the interview process: **How to Write a Client Summary.**

Interview Report: Writing the Summary

After interviewing the applicant, we ask you to write a summary for the members of the Applicant Review Panel (ARP). See sample summary for ideas.

- This narrative should be explicit, as it is the written record of your discoveries during the interview about the applicant's history--both the medical, and the family and living situations.
    - Please break down her/his financial situation including income, property and expenses.
    - Clearly state whether or not you think the client is eligible for assistance, and document your reasons for that determination. The ARP will make decisions based on your recommendations.
- Remember to include in your recommendation the length of time the assistance will continue in the space provided on the form, as well as in your narrative explanation.
    - For example, if you indicate that assistance be provided through June 2011, the last assistance will be sent to the client at the end of May, and will be used by the client to cover expenses in June.
- Once completed, upload the completed Client Summary to BCS' intranet, WebEx. Our program staff can walk you through this process in person or on the phone if you need help. WebEx is a secure website that helps us keep private information secure according to HIPAA regulations.

Follow-up: After the ARP Makes a Decision

- You will be notified of the ARP's decision within 2 days. Please contact the applicant with the ARP's decision quickly, within 1 day if possible. If the decision was made not to support the applicant, explain why and, when possible, recommend alternative resources. If you need help communicating with the client, please notify BCS staff immediately and we will help you!
    - If support was approved, let her/him know what kind(s) of assistance will be provided.
    - Checks are made out to the client's payees/creditors only (i.e., her landlord, the utility company, etc.), We do not write checks directly to clients.
    - Checks are mailed at the end of the month for bills that are due at the beginning of the following month.

- Make a notation of each future contact with the client in your client folder and in the Client Database on WebEx.
    - Contact should be at least monthly by phone, unless further face to face contacts are needed.
    - During your monthly contacts, you will ask the client if she is going to all of her treatment appointments, and if she has had any financial or household changes. Please complete the CSV Monthly Check-in Form for each client every month to make sure that we have up-to-date information for each client.

- Monthly Client Review meetings are held typically on the second or third week of every month. Your next training newsletter will provide greater detail on the Client Review meeting, but here are a few reminders:
    - One week before the meeting, please send updated information (completed CSV Monthly Check-in Forms) to Nicolette at the BCS office.
    - If you submit your updates by email, you many only put the client number on the form. Or, you may bring your completed **CSV Monthly Check-in Forms** to the meeting.
    - Even if you plan to attend Client Review, we ask that you send your updates ahead of time for preparation of the documents used during the meeting.