

Benefits Enrollment Center Intake Form

Agency Name: _____

Client Name: _____

Client Phone Number/Email Address: _____

Date: _____

Age bracket:

18-49 (with a disability & eligible for Medicare)

50-59 (with a disability & eligible for Medicare)

60-64 (with a disability & eligible for Medicare)

65-74

75 +

Gender categories:

Male

Female

Non-binary

Other

Do you identify as transgender?

Yes

No

Sexual Orientation:

Bisexual

Gay or lesbian

Straight

Something else

I don't know

Declined to answer

Race and Ethnicity:

American Indian or Alaskan Native

Asian or Asian American

Black or African American

Hispanic, Latino, or Spanish Origin

Native Hawaiian or Pacific Islander

White

Two or More Races

Annual Individual Income:

Below \$10,000

\$10,000-\$14,999

\$15,000-\$19,999

\$20,000-\$24,999

\$25,000-\$29,999

\$30,000 or more

Marital Status:

Single

Married

Married Living Separately

Divorced

Widowed

Health Status:	Rural Status:	Veteran Status:
Excellent	Reside in Rural Area	Yes
Very Good	Do not Reside in Rural Area	No
Good		
Fair	Disability Status:	
Poor	Yes	
	No	

To be filled out by BEC staff:

Please check the box(es) for which you completed an application or renewal application for the individual above. Please check all that apply. (Note that completing applications for Medicare Parts C and D are not benefits.).

Part D Extra Help (LIS)	Lifeline
Medicare Savings Programs (MSP)	Public Assistance (Temporary Assistance for Needy Families (TANF), Tribal Temporary Assistance for Needy Families (TTANF), Bureau of Indian Affairs (BIA) General Assistance)
Supplemental Nutrition Assistance Program (SNAP)	
Medicaid	Unemployment Insurance
Low-Income Home Energy Assistance (LIHEAP)	Subsidized Transit Benefits
Supplemental Security Income (SSI)	Home Internet (e.g. Access from AT&T)
Social Security Disability Insurance (SSDI)	Home Benefits (e.g. Weatherization, Section 504 Home Repair, FEMA)
Prescription Drug Benefits other than Part D (e.g. State Pharmaceutical Assistance Programs (SPAP))	Other Food Benefits (e.g. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC); The Emergency Food Assistance Program (TEFAP); Free and Reduced Price School Meals; Food Distribution Program on Indian Reservations (FDPIR))
Tax Benefits (e.g. Property Tax Relief, Earned Income Tax Credit (EITC), Child Tax Credit (CTC))	General Other Means-Tested Benefits (e.g. Childcare Subsidies)
Veteran's Benefits (Aid & Attendance, VA Disability Compensation, VA Pension, etc.)	
Housing Subsidies (e.g. Public Housing, Section 8, Rent Subsidies)	