

Financial Emergency Assistance Intake Form

* Indicates required question

1. Due date of PIN's bill *
(if no due date is specified type 01/01/2000)

Example: January 7, 2019

2. Today's Date *

Example: January 7, 2019

3. Last name (ask PIN to spell this for you even if you think you know the spelling) *

4. First name (ask PIN to spell this for you even if you think you know the spelling) *

5. VOLUNTEER READ

*

"Before we continue, I must read you some important information from Shelby Hope's Resource Responsibility Requirement (RRR).

Shelby Hope's Financial Emergency Assistance committee grants individuals a maximum total of \$350 in a 12-month period.

The FEA committee does not give cash or checks to individuals.

Individuals must have a verifiable bill and provide the FEA committee with a way to pay the bill-issuing company or landlord directly.

Shelby Hope staff and/or volunteers will not guess or guarantee whether an individual will receive FEA.

The due date of the bill is factored into the FEA committee's decision making.

FEA is not a guaranteed \$350 source of revenue for individuals every 12 months. The goal of these financial gifts is to help individuals reach financial stability. FEA does not seek to encourage unsustainable choices or circumstances.

In order to accomplish the ultimate goal of FEA, which is to help people focus on paying their future bills on their own and eventually reach financial stability, anyone seeking assistance must be aware of all of the following resources and pursue any applicable resources before being given a FEA gift.

There may be some questions that don't specifically apply to your situation, but as the volunteer, I have to read each item to myself or out loud and then write a response even if the response is just that the question doesn't apply to you. Please be patient while I do my best to complete all the pieces."

Based on what I just read, Mr./Ms. _____, should we continue the intake process?

Mark only one oval.

PIN said "yes"

PIN expressed reluctance, and I assured him/her that I understand the process feels long. I explained the fastest way for FEA committee to help is for me to provide a thoroughly completed form.

PIN said "no." I asked if I could give PIN the RRR before we ended the conversation. I explained financial assistance cannot be given without completing the intake process.

PIN agreed to continue after one or both of the above explanations

PIN hung up or left

6. Town/City of PIN *
- (type "no response" if PIN does not answer)

7. Physical/street Address of PIN, including apartment number if applicable, (ask PIN to spell *
road names for you even if you think you know the spelling)
- (type "no response" if PIN does not answer)

8. State and zip code of PIN *
- (type "no response" if PIN does not answer)

9. Full **mailing address** if different from above physical address, including apartment number *
if applicable, of PIN
- (type NA if the mailing address is the same as physical address)
- (type "no response" if PIN does not answer)

10. How many adults live in your household? *
- (type "no response" if PIN does not answer)

11. How many children live in your household? *
- (type "no response" if PIN does not answer)

12. How old are each of the children living in the household? *

(if there are no children, type NA)

(type "no response" if PIN does not answer)

13. Who is your employer or what is your means of income (SSI, disability, etc.)? *

(type "no response" if PIN does not answer)

14. Who is the employer or what is the means of income (SSI, disability, etc.) for the other adults in the household? *

(type source of income for every adult in the home and if there are no other adults in the household type NA)

(type "no response" if PIN does not answer)

15. What is the bill you need help paying? *

(continue through intake form in order but you only to ask questions or read information out loud that pertain to the specific type of bill PIN needs help with)

(type "no response" if PIN does not answer)

16. What has happened or changed for you that you now need assistance with this bill? *

(type "no response" if PIN does not answer)

17. Do you have any money you can apply to this bill? *

Mark only one oval.

yes

no

no response

18. If yes to the above question, how much money can you put toward this bill? *

(type NA if PIN has no money for the bill)

(type "no response" if PIN does not answer)

19. additional notes on the funds they can or cannot put toward the bill *

(if there are none, type NA)

20. Who referred you to Shelby Hope or how did you know to reach out to us? *

(type "no response" if PIN does not answer)

(type "Idk" if PIN does not know or remember)

21. **Housing and or utility related**

*

If PIN has a child, has PIN contacted the child's school counselor for help?

Mark only one oval.

yes

not yet

PIN does not have a child

not Housing and or utility related

no response

22. **Housing and/or Utility related**

*

If yes, when did PIN contact the child's school counselor for help? Follow format of month, date, then year.

(type NA if counselor has not been contacted)

(type "no response" if PIN does not answer)

23. **Housing and/or Utility related**

*

If PIN **has child but has not contacted the school counselor**, tell PIN counselors should be contacted because

"School counselors often have better access to people at DSS who can help. They also have access to other resources to help families survive financial hardships. Please also know that asking your child's school counselor for specific help regarding providing your child with weather and/or situationally appropriate clothes, extra food, an unexpected high cost of a power/water bill, a security deposit, first month's rent, or a rent bill is ok and does not mean your child will be removed from your care."

Then ask PIN if you can look up the school's phone number for him/her.

Mark only one oval.

- PIN asked me to give him/her the school phone number, and I did.
- PIN did not want my assistance
- PIN already contacted counselor
- PIN does not have a child
- no response

24. **Housing and/or Utility related**

*

What was the response of the child's school counselor?

(If a counselor was not contacted type NA)

(type "no response" if PIN does not answer)

25. **Housing and/or Utility related ***

Has PIN contacted DSS?

Mark only one oval.

yes

not yet

not applicable

no response

26. **Housing and/or Utility related**

*

If yes, when did PIN contact DSS? **Follow the format of month, date, and then year.**

(if not contacted type NA)

(type "no response" if PIN does not answer)

27. **Housing and/or Utility related**

*

What was DSS's response to PIN?

(if not contacted type NA)

(type "no response" if PIN does not answer)

28. **Housing and/or Utility related**

*

If PIN has not contacted DSS, say, "DSS may give \$500 to meet bill requests once every 13 months. May I give you the phone number?"

Mark only one oval.

- I gave PIN the phone number
- PIN declined the phone number
- not applicable
- no response

29. **Power Only**

*

Has PIN contacted Greater Cleveland County Baptist Association?

Mark only one oval.

- yes
- not yet
- not applicable
- no response

30. **Power Only**

*

If yes, when did PIN contact Greater Cleveland County Baptist Association? **Follow the format of month, date, and then year.**

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

31. **Power Only** *

What was GCCBA's response to PIN?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

32. **Power Only** *

If PIN has not yet contacted GCCBA, say "the GCCBA can give \$75 every 13 months and exceptions can be made for Duke Power customers because Duke Power offers the association an extra allotment for assistance purposes. May I give you the phone number, address, or the hours?"

Mark only one oval.

- I gave PIN the information
- PIN declined the information
- Not applicable to PIN
- no response

33. **Housing and/or Utility related** *

Has PIN contacted the Salvation Army?

Mark only one oval.

- yes
- not yet
- Not applicable to PIN
- no response

34. **Housing and/or Utility related**

*

If yes, when did PIN contact Salvation Army? **Follow the format of month, date, and then year.**

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

35. **Housing and/or Utility related**

*

What was the Salvation Army's response to PIN?

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

36. **Housing and/or Utility related**

*

If PIN has not yet contacted the Salvation Army, say, "Remind me, are you a city of Shelby resident?" If PIN **is** a resident, say, "Neighbors Helping Neighbors Program is an additional program that operates out of the Salvation Army to help City of Shelby utility customers with their City of Shelby utility bills. Even if you are struggling with a different bill, this might be worth pursuing for the future. The program does not specify how much money it gives to individuals or how often it accommodates repeat requests. To realistically receive money from this program, you must physically line up at the front door of The Salvation Army building by 6 a.m on the first business day (M-F) of the month. Though the doors do not open until 8 a.m. people begin lining up very early and they are helped on a first-come first-served basis. Generally, this specific program's allotment of money is spent early in the day on the first day of the month, and it helps approximately 12 people a month. May I give you the phone number, address, or the hours?"

If PIN **isn't** a city of Shelby resident, ask "May I give you the Salvation Army's phone number, address, or the hours?"

Mark only one oval.

- I gave PIN the information
- PIN declined the information
- Not applicable to PIN
- no response

37. **Housing Only** *

Has PIN contacted the Shoal Creek Baptist?

Mark only one oval.

yes

not yet

Not applicable to PIN

no response

38. **Housing Only** *

If yes, when did PIN contact Shoal Creek Baptist? **Follow the format of month, date, and then year.**

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

39. **Housing Only** *

What was Shoal Creek Baptist's response to PIN?

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

40. **Housing Only**

*

If PIN has not yet contacted Shoal Creek Baptist, say, "the church receives federal grant funding to help those in need with 30-day late rent. Assistance gifts are usually about \$200 and must be applied to 30-day late rent. May I give you the phone number, address, or the hours?"

Mark only one oval.

- I gave PIN the information
- PIN declined the information
- Not applicable to PIN
- no response

41. **Utility Only**

*

What amount do you owe?

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

42. **Utility Only**

*

Is this the amount you will owe for the current bill or is this a past due amount?

Mark only one oval.

- current amount owed
- past amount owed
- current amount combined with previous amount owed
- not applicable to PIN
- no response

43. **Utility Only**

*

Additional notes about the above amount questions go here. Type NA if there are none.

44. **Utility Only** *

What is the company's name for the bill you owe?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

45. **Utility Only** *

What is your account number with this company?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

46. **Utility Only** *

What is the phone number for this company?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

47. **Housing Only**

*

What is the amount you owe?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

48. **Housing Only**

*

Is this the amount you will owe for the current month or is this a past due amount?

Mark only one oval.

- current amount owed
- past amount owed
- current amount combined with previous amount owed
- not applicable to PIN
- no response

49. **Housing Only**

*

Additional notes about the above amount questions may go here. Type NA if there are none.

50. **Housing Only**

*

What is the name of your landlord or property management company?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

51. **Housing Only**

*

What is the phone number for your landlord or property management company?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

52. **Housing Only** *

What is the full address of the property you are renting?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

53. **Housing Only** *

What is the full address of the landlord or property management company?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

54. **OTHER** *

What amount do you owe?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

55. OTHER

*

Is this the amount you will owe for the current bill or is this a past due amount?

Mark only one oval.

- current amount owed
- past amount owed
- current amount combined with previous amount owed
- Not applicable to PIN
- no response

56. OTHER

*

Additional notes about the above amount questions may go here. Type NA if there are none.

57. OTHER

*

What is the company's name for the bill you owe?
(type NA if this doesn't apply to PIN)
(type "no response" if PIN does not answer)

58. OTHER *

What is your account number with this company?

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

59. OTHER *

What is the phone number for this company?

(type NA if this doesn't apply to PIN)

(type "no response" if PIN does not answer)

60. **Food**

Tell Pin, "We are in the last long section of questions. Even though the bill you're requesting assistance for is not food related, you must pursue one or many of the following food resources. If food costs are met in other ways, people have increased flexibility to apply their money to housing, utility, and medical bills. Please bear with me as I ask several questions related to food assistance."

Record any notes related to the food information here. If you have none, type NA.

61. **Food**

*

Have you used the food programs related to Shelby Presbyterian Church? May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

62. **Food**

*

Have you used the food programs related to Mt. **Calvary Baptist Church**? May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

63. **Food**

*

Have you used the food programs related to **Boiling Springs Baptist Church**? May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

64. **Food**

*

Have you used the food programs related to

Central United Methodist Church?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

65. **Food**

*

Have you used the food programs related to

Central United Methodist Church?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

66. **Food**

*

Have you used the food programs related to

Washington Missionary Baptist?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

67. **Food**

*

Have you used the food programs related to

Ross Grove Baptist Church?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

68. **Food**

*

Have you used the food programs related to

Episcopal Church of the Redeemer?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

69. **Food**

*

Have you used the food programs related to

Hoppers Chapel Baptist Church?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

70. **Food**

*

Have you used the food programs related to

Washington Outreach Ministry?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

71. **Food**

*

Have you used the food programs related to

First Baptist Church (Shelby) ?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

72. **Food**

*

Have you used the food programs related to
Union Baptist Church?

May I share what is offered there, the times, days, address and phone number?

Mark only one oval.

- PIN has used these programs and didn't need the information
- PIN has used these programs and wanted the information
- PIN has not used these programs and didn't want the information
- PIN has not used these programs and wanted the information
- No response

73. **VOLUNTEER READ**

*

"I will be submitting all information we've gone over today to the executive assistant and director of Shelby Hope within the next 10 minutes. They will review your information and notify the FEA committee. While you wait on the FEA committee's decision, call Shelby Hope and ask to update your intake form if any of your answers need to be changed because of things such as a new job, or you've reached out to other resources, or heard back from another agency."

Mark only one oval.

- Said the information to PIN
- Did not say the information to PIN

74. Ask, "Is there anything else you (PIN) would like to tell me or share with the committee that might help you?" *
(record the response below)

75. Ask, "Besides being called about the FEA's decision, would like a follow-up counseling call with a full-time Shelby Hope employee?" *

Mark only one oval.

- PIN said yes
- PIN said no
- No response

76. If PIN answered yes to the previous question, record the best phone number to reach them. *
Type NA if PIN does not want a counseling call. Type "no response" if PIN did not answer.

77. Say to PIN, "Thank you for contacting Shelby Hope today. Please remember no one makes it through life without help from someone." *

Ask PIN if they would like an electronic copy of the RRR or a hard copy handed or mailed to them.

Record PIN's answer to RRR question below. Include applicable email or mailing address.

Finally, assure PIN that the FEA committee will call with its decision at least one business day before the bill is due.

The only exception is if a request is received on the same day the bill is due. In that case, the committee will do the best it can, but it makes no guarantees.

Tell PIN goodbye and hang up the phone or ask a Shelby Hope employee to walk PIN out of the building.

78. Is there anything else to share with or explain to the committee in regard to this PIN? *

Record thoughts below. Type NA if you have nothing additional to share.

79. Email the executive assistant once form is submitted. *

Mark only one oval.

I understand that the executive assistant wants me to email her as soon as the form is submitted.

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