## SENIOR COMPANION VOLUNTEER

## ENROLLMENT FORM

### Name (Typed or Printed) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ City / State / Country of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Physical Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Physical Condition: ☐ Excellent ☐ Good ☐ Fair ☐ Poor

Please Explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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COVID-19 Vaccinated ☐ Yes ☐ No

Contact in case of Emergency:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Relationship: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Beneficiary:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Relationship: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Why would you like to be a Senior Companion Volunteer?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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How did you hear about the Senior Companion Program?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Are you a veteran of the U.S. Armed Forces? ☐ Yes ☐ No

Do you have your own means of transportation? ☐ Yes ☐ No

Valid Drivers License? ☐ Yes ☐ No

Current auto insurance? ☐ Yes ☐ No

Valid Drivers License and current proof of insurance will be required before transportation of

clients or reimbursement of mileage.

If not what kind of transportation do you plan to use? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

List Hobbies and Special Skills: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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What languages do you speak? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Have you ever been *arrested,* *charged or convicted* of a misdemeanor and/or felony?

☐ Yes ☐ No

If yes, please describe\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you consent to the Senior Companion Project arranging for a criminal history check in accordance with the Federal requirements for the Senior Companion Program?

☐ Yes ☐ No

Please list Two character references

**Name Address City Phone**

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I understand that a background check will be conducted prior to volunteer placement. I understand that information collected during this background check will be limited to information which is appropriate in determining my suitability for volunteer service in the Senior Companion Program and that all information collected will be kept confidential.

If I am enrolled as a volunteer, I agree to comply with all Senior Companion Program policies. The Senior Companion Program was established by the Domestic Volunteer Act of 1973 and adheres to volunteer requirements published in the Federal Register. I understand that providing false, incomplete, or misleading information will result in immediate dismissal from the Senior Companion Program.

YOUR SIGNATURE:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**OPTIONAL GENDER, ETHNICITY AND RACE IDENTIFICATION**

Gender, ethnicity, and race information is requested on a **voluntary** basis.

It is used for maintaining the records for program research or survey response and in the production of summary descriptive statistics and analytical studies in support by AmeriCorps.

**Providing this information is voluntary and has no impact on your application or volunteer status.**

|  |  |
| --- | --- |
| **Optional Question 1.**  What gender do you identify as: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (fill in the blank) | |
| **Specific Instructions:** The two questions below are **designed to identify your ethnicity and race. Regardless of your answer to question 2, go to question 3.** | |
| **Optional Question 2:**  Are You Hispanic or Latino? (A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.)  ☐ Yes ☐ No | |
| **Optional Question 3.** Please select the racial category or categories with which you **most closely identify** by placing an “**X**” in the appropriate box. Check as many as apply. | |
| **RACIAL CATEGORY (Check as many as apply)** | **DEFINITION OF CATEGORY** |
| ☐ American Indian or Alaska Native | A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment. |
| ☐ Asian | A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. |
| ☐ Black or African American | A person having origins in any of the black racial groups of Africa. |
| ☐ Native Hawaiian or Other Pacific Islander | A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. A person having origins in any of the original peoples of Europe, the Middle East, or North Africa. |
| ☐ White | A person having origins in any of the original peoples of Europe, the Middle East, or North Africa |

**Senior Companion Program**

**2023 Income Eligibility Levels**

**To Earn Hourly Stipend**

The chart below is designed to help you decide whether or not you will qualify, based on your current income, to become a stipend volunteer. Stipend volunteers receive approximately $150-$400 a month, dependent on the number of hours served. This hourly stipend is non-taxable, and **is not considered income**. All stipend volunteers must be willing to serve a *minimum* of 5 hours each week – no exceptions. (An important fact to keep in mind: because the hourly stipend is not considered income, by law, it cannot be factored into income for loan applications.)

Please fill out the enclosed “Income Eligibility” (blue) form to see if your income qualifies you to become a stipend volunteer with the Senior Companion Program. ***If your income is over the maximum allowed,***be sure to deduct any allowed medical expenses as explained on the back of the “Income Eligibility” form.

|  |  |  |
| --- | --- | --- |
| Family Unit Size | Maximum  Annual Income Allowed to Qualify for Hourly Stipend | Maximum  Medical Deduction Allowed |
| 1 | $29,160 | $14,580 |
| 2 | $39,440 | $19,720 |
| 3 | $49,720 | $24,860 |
| 4 | $60,000 | $30,000 |
| 5 |  |  |
| 6 |  |  |

\*\*Please call with any questions and/or concerns

about this part of the application process\*\*

**What is considered income for determining volunteer eligibility?**

**According to Section 2551.44 of the Senior Companion Program Regulations:**

1. For determining eligibility, “income” refers to total cash or in-kind receipts before taxes from all sources including:
2. Money, wages, and salaries before any deduction, but not including food or rent in lieu of wages;
3. Receipts from self-employment for from a farm or business after deductions for business or farm expenses;
4. Regular payments for public assistance, Social Security, Unemployment or Workers Compensation, strike benefits, training stipends, alimony, child support, and military family allotments, or other regular support from an absent family member or someone not living in the household;
5. Government employee pensions, private pensions, and regular insurance or annuity payments; and
6. Income from dividends, interest, net rents, royalties, or income from estates and trusts.
7. For eligibility purposes, income does not refer to the following money receipts:
8. Any assets drawn down as withdrawals from a bank, sale of property, house or car, tax refunds, gifts, one-time insurance payments or compensation from injury.
9. Non-cash income, such as the bonus value of food and fuel produced and consumed on farms and the imputed value of rent from owner-occupied farm or non-farm housing.
10. Per capita payments from certain tribal trust settlements. The IRS provides more information on these settlements, including a list of eligible tribes.

**What are allowable medical expenses that may be deducted from income?**

**According to the Senior Companion Program Regulations, Section 2551.43(c):**

Allowable medical expenses are annual out-of-pocket medical expenses for health insurance premiums, health care services, and medications provided to the applicant, enrollee, or spouse which were not and will not be paid by Medicare, Medicaid, other insurance, or other third party pay or, and ***which do not exceed 50 percent of the applicable income guideline***.

**Examples of allowable out-of-pocket medical expenses:**

**Health Insurance Costs:**

Private Insurance, Medicare/Medicaid Premiums, Long Term Care Insurance premiums, Co-payments and Deductibles

**Prescription Drugs:**

Pharmacy Program Co-payments and Deductibles

**Medical Bills for Dr. Visits:**

Included, but not limited to: Medical Care, Dental Care, Vision Care

**Other out-of-pocket Medical expenses:**

One time medical expense; equipment (supplies for dentures, hearing aids, eyeglasses, wheelchairs, canes, etc.); Over the counter drugs and supplies (pain relievers, antacids, hearing aid batteries, vitamins, non-prescription eye glasses)

**Income Eligibility**

To receive stipend a volunteer may not have an annual income from all sources, after deducting allowable medical expenses, which exceeds the program’s income eligibility guideline. Annual income is to be counted for the *past 12 months* for serving volunteers and is *projected* for the next 12 months for new applicants.

Name: Primary Phone: Birth Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number in household: Martial Status: ☐ Married ☐ Widow(er) ☐ Single ☐ Divorced

|  |  |  |
| --- | --- | --- |
| Source of Income  If married combine both incomes, if living in same residence | Monthly Income | Yearly Income |
| Salary/Wages | $ | $ |
| Social Security Benefits | $ | $ |
| Supplemental Security Income (SSI) | $ | $ |
| Pension | $ | $ |
| Income from Annuities / Pension | $ | $ |
| Net Rental Income | $ | $ |
| Interest Received / Income from Stocks and Bonds | $ | $ |
| Alimony | $ | $ |
| Other: See back for list of countable income | $ | $ |
| TOTAL | $ | $ |
|  |  |  |
| Out–of-pocket medical expenses | Monthly and/or One Time Medical | Yearly Medical |
| Health Insurance Costs | $ | $ |
| Prescription Medications | $ | $ |
| Eyeglasses / Contact Lenses / Hearing Aids / Dentures | $ | $ |
| Other: See back for allowable deductions | $ | **$** |
| Up to 50% of the maximum qualifying amount can be deducted TOTAL | $ | **$** |

|  |
| --- |
| **OFFICE USE ONLY**  Total yearly income $  Minus total allowable medical: -  Total Yearly Adjusted Income: $  Qualifying Income Level: $ |

I certify that the information provided is correct and understand that falsification of information may result in my being deemed ineligible to receive a stipend as a Senior Companion.

Volunteer Signature Date

Program Staff Signature Date