

# SPECIAL NEEDS ASSISTANCE



## Special Needs Assistance for Seniors

### INFORMATION BOOKLET

---

If you have questions or require additional information, please call **Alberta Seniors and Community Supports** toll free at 1-800-642-3853 or 427-7876 in Edmonton.

**Program Year Effective**  
**July 1, 2006 to June 30, 2007**

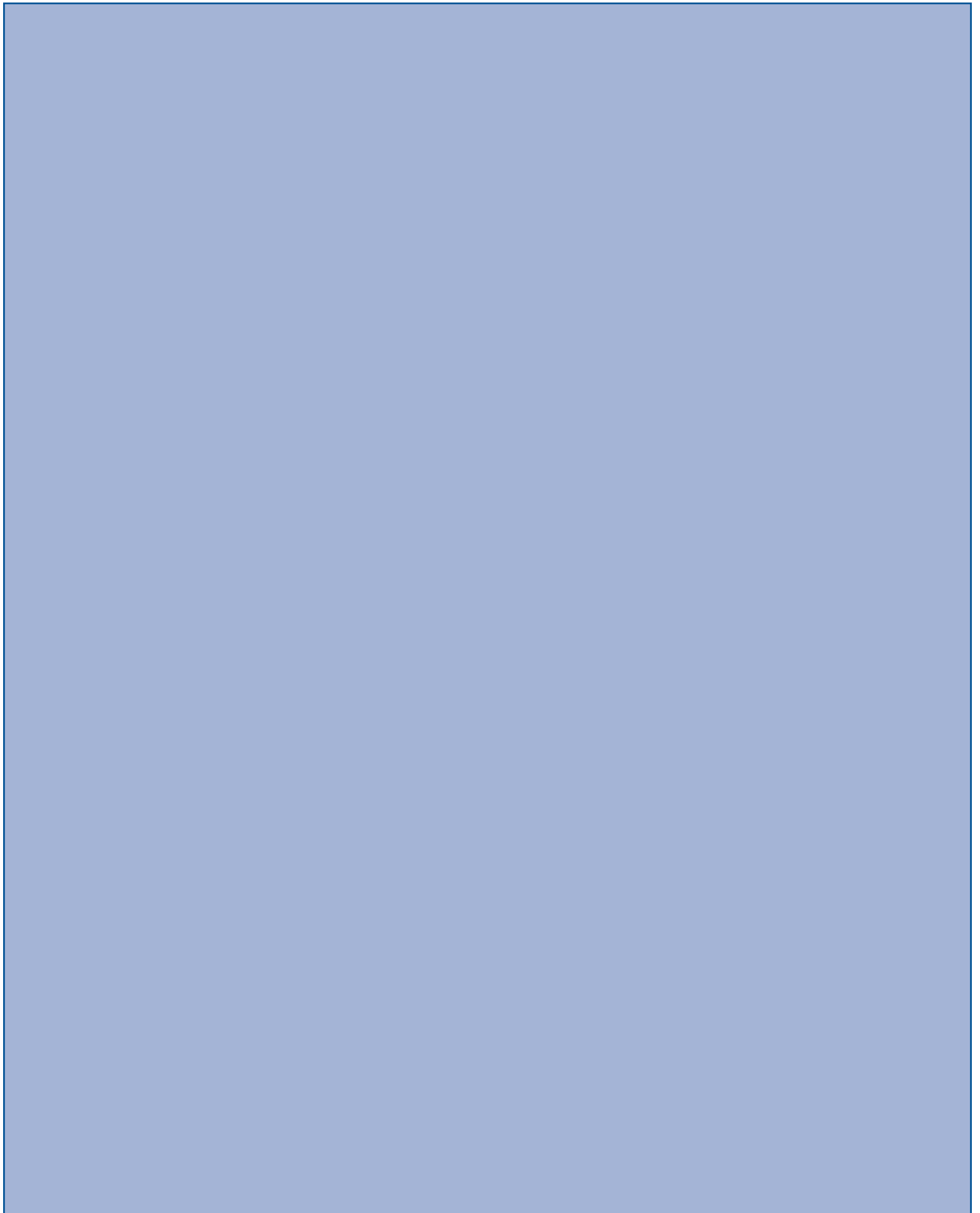
**Alberta**  
Seniors and  
Community Supports



# Special Needs Assistance for Seniors

## INFORMATION BOOKLET

<b>Contents</b>	<b>5</b>	<b>Special Needs Assistance for Seniors</b>
	<b>6</b>	<b>General Eligibility Requirements</b>
	<b>6</b>	<b>Other Assistance</b>
	<b>7</b>	<b>Application Process</b>
	<b>9</b>	<b>Benefit Year</b>
	<b>9</b>	<b>Accounting</b>
	<b>10</b>	<b>Income Eligibility</b>
	<b>11</b>	<b>General Information for Specific Expenses</b>
	<b>12</b>	<b>Primary Expenses</b>
	<b>14</b>	<b>Secondary Expenses</b>
	<b>15</b>	<b>Do Not Submit</b>
	<b>16</b>	<b>Expenses Not Considered</b>
	<b>19</b>	<b>Special Circumstances</b>
	<b>20</b>	<b>How Will Your Payment be Made?</b>
	<b>21</b>	<b>Appeal Process</b>
	<b>22</b>	<b>Protection of Personal Information</b>
	<b>22</b>	<b>Contacts</b>



# Special Needs Assistance for Seniors

**The Special Needs Assistance for Seniors program** is based on income and provides financial assistance to eligible lower-income seniors who have financial difficulties. Please note that only the items identified in this booklet are considered for funding from this program. As well, this program is considered as funding of last resort to assist seniors who cannot make ends meet and who have no other financial resources.

**All applications** are carefully considered. Benefits are given to those seniors who have the greatest need. A single senior with a total annual income of less than \$21,700 or a senior couple with a total combined income of less than \$34,900 may be eligible to receive a special needs benefit.

Special circumstances may be considered on a case-by-case basis. If you have special circumstances, please explain on a separate page and attach it to the application form.

A senior's income level and the type of expense applied for will determine the amount funded. The maximum benefit available is \$5,000 in a benefit year (July 1 to June 30).

**This booklet provides** information about the types of special needs that will be considered and the amount of benefits that may be paid.



## What is a special need?

*A special need is a one-time or extraordinary personal expenditure, that cannot be foreseen nor budgeted for considering the financial situation of the senior, and is required to meet the needs of a lower-income senior.*

# General Eligibility Requirements

## To be eligible to apply for a special needs benefit you must:

1. be 65 years of age or older,
2. be an Alberta resident and have lived in Alberta at least three months before applying,
3. have submitted an application to the Alberta Seniors Benefit program,
4. have submitted a completed Special Needs Assistance application form, and
5. have income within the threshold.

## Other Assistance

**The provincial and federal governments** offer several assistance programs for seniors. You should contact these programs first to see if you are eligible for assistance from them before applying to the Special Needs Assistance for Seniors program.

These programs include, but are not limited to:

### Provincial Government Programs:

- Alberta Aids to Daily Living
- Alberta Monitoring for Health
- Residential Access Modification

### Federal Government Programs:

- Guaranteed Income Supplement
- Residential Rehabilitation Assistance program
- Emergency Repair program
- Home Adaptations for Seniors' Independence program

For a complete list of programs for seniors and contact phone numbers, please visit the Alberta Seniors and Community Supports website at [www.seniors.gov.ab.ca](http://www.seniors.gov.ab.ca) or refer to the Seniors Programs and Service Information Guide. This guide is available by telephoning the number listed in the Contacts section.



# Application Process

**A Special Needs Assistance for Seniors application** form needs to be submitted only once during a benefit year. If you have more special need expenses during the same benefit year, you only need to submit an estimate or receipt. Your original application will be reassessed.

Your prior year's income information, as reported to the Canada Revenue Agency, will be used to assess your application. However, if you reported business, farming, or rental income or losses, you will need to submit your tax return with your application form.

The application form includes a section to list your special need expenses. Supporting documentation is required as described in this booklet.

**If you have a spouse/partner**, all spousal/partner information must be completed on the application form. The term "partner" applies to adults living common-law or in an adult interdependent relationship.

*Continued on next page...*



## Please Note

*Your application form will be returned to you, if it has not been signed by both you and your spouse/partner.*

# Application Process continued

## Supporting documentation

Please ensure that you have included all the information needed to support your application. You may be contacted for more information about your specific situation, if it is required to complete the assessment of the application. If additional information is not provided, the application will be assessed with the information on hand or the file may be closed if the missing information is critical to making a decision.

## What happens after you apply?

Your application will be thoroughly reviewed by Special Needs Assistance for Seniors staff. It may take about three weeks to process your application, and longer if additional information must be requested. There are also times during the year when the volume of applications increase, which may result in a longer processing time.

**When a decision** has been made on your application, you will receive a letter notifying you of the decision.

## Assistance is available to complete your application

If you have difficulty completing your Special Needs Assistance application form, help is available by calling Alberta Seniors and Community Supports at the telephone number in the Contacts section.



## What if it is an emergency?

*If you face an emergency related to an allowed expense, telephone 1-800-642-3853 or 427-7876 in Edmonton.*

*Your situation will be dealt with if it falls within the scope of the Special Needs Assistance program and it is a real emergency.*



## Benefit Year

**The benefit year** starts July 1 of one year and finishes June 30 of the following year. Applications received in the Special Needs Assistance office or Seniors Information Service Offices on or before June 30 will be assessed for that benefit year.

Applications received July 1 or later will be assessed for the new benefit year. The date your application is received in an Alberta Seniors and Community Supports' office determines the benefit year for which it is considered.

## Accounting

**Seniors who receive benefits** may be asked, in the letter that accompanies the cheque, to provide receipts for the goods and/or services that have been funded by the program. These receipts must be mailed to the program within three months of receipt of the cheque. If the receipts have not been received, a reminder letter will be sent.

Failure to provide the receipts or failure to spend the money for those items funded may result in a request to return the funds. A senior who does not provide a receipt or return the funds may not be eligible for assistance from the program in the future.

# Income Eligibility

## Single Seniors

Annual Income	Funding Level
Less than \$17,500	Primary and secondary items
\$17,501 to \$21,700	Primary items only
Over \$21,700	No funding

## Senior Couples

Annual Income	Funding Level
Less than \$27,100	Primary and secondary items
\$27,101 to \$34,900	Primary items only
Over \$34,900	No funding

The following lists provide general information about the items that are funded at the primary and secondary income levels. The sections that follow the lists provide more details about the specific items that are funded.

### Primary items

- **Appliances**  
(bed, fridge, stove, lift chair)
- **Major home repairs**  
(furnace, hot water tank, house roof, septic, sewer, well/cistern, and steps)
- **Primary medical costs**  
(diabetic, medical trips, nutritional beverages, prescriptions, dispensing fees, hearing aids, podiatrist costs)
- **Personal response system**
- **Funeral costs**

### Secondary items

- **Appliances**  
(washer, dryer, microwave, vacuum, television)
- **Minor home repairs**  
(exterior doors, garage roof, eaves/soffit/facia)
- **Secondary medical**  
(orthotics, respite care)
- **Housekeeping/yard maintenance**
- **Laundry costs**

# General Information for Specific Expenses

**Appliances/furniture: Guideline – only one of each allowed appliance/furniture type is considered in a lifetime.**

Only **one** appliance/furniture item will be considered in a benefit year. Funding may be provided for new or used appliances.

Your type of residence determines which appliances/furniture items you can apply for:

- Homeowners and mobile homeowners are considered for all appliances/furniture.
- Renters are considered for a bed, lift chair, microwave, television, and vacuum.
- Applicants living with family/friends are considered for a bed or a lift chair.
- Long-term care residents are considered for a television.
- Lodge and Designated Assisted Living residents are considered for a bed, television, and lift chair.

**Home repair: Guideline – a maximum of \$10,000 in a lifetime.**

You must be a homeowner or mobile homeowner on the Alberta Seniors Benefit program to receive assistance in covering the cost of home repairs. A copy of your current land title will be obtained to verify that you are the homeowner or have a legal life estate interest in your residence.

Mobile homeowners must submit a copy of the bill of sale or proof of insurance for the mobile home for three years the first time they apply. For following years, proof of insurance for the current year must be submitted.

You must have owned and lived in the home for three consecutive years immediately prior to applying for assistance with home repairs. You are expected to live in the home for three years after obtaining a benefit for home repairs. However, repairs of a critical nature (e.g. furnace, hot water tank) may be considered on a case-by-case basis.

Only repairs that are described in the booklet will be considered. Some home repairs are beyond the scope of the program and may not be considered.

**You must provide two written estimates with your application. These must be from a contractor and must state the nature and cost of the needed work and the contractor's name, address, and phone number.** The contractor should also describe the current condition and explain why the repair needs to be done. Each repair should be listed separately on the estimate along with an individual cost breakdown. Staff from the Special Needs Assistance program may visit your home to verify the need for the repairs.

# Primary Expenses

**Appliances** – Includes purchase of an appliance and/or repair of an appliance.

Appliance	New	Used	Notes
Bed	\$700	\$200	Includes mattress and frame
Lift Chair	\$800	\$500	A doctor's note must be provided explaining the medical condition that requires the use of a lift chair.
Refrigerator	\$800	\$250	
Stove	\$900	\$300	

*All appliance/furniture amounts include GST, delivery and installation/hook-up.*

## Funeral expenses – Maximum \$1,200

Funeral expenses are only considered for a deceased spouse/partner and no other family member. The surviving spouse/partner must be over 65 years at the time of the spouse/partner's death and the application must be made within 12 months of the date of death. A bill/invoice or receipt must be provided.

## Home repairs

- **Cistern**
- **Electrical repairs**
- **Furnace** repair/replacement – basic, single-stage, mid-efficient furnace, if the furnace needs to be replaced. You will need to provide a report of the current condition of the furnace from either a gas company or a furnace contractor. A gas company report is preferred. Upgrades (replaced for efficiency only, humidifiers,

electrostatic filters, AC motor, special thermostat) are not funded. Maximum amount \$2,400.

- **Hot water tank** replacement. Standard amount \$700.
- **Mobile home skirting** repair/replacement. Maximum amount \$1,600.
- **Plumbing repairs**
- **Roof repair** – house roof – basic repair on a house or mobile home, 20 or 25-year asphalt shingles only (no other roofing materials or roof modifications). No funding for pine shake removal. A porch roof is considered part of the house roof. Maximum amount \$2,500.
- **Sewer/septic tank** repair/replacement
- **Step – entrance** repair/replacement. Maximum amount \$900.
- **Well** repair/replacement

*Continued on next page...*

# Primary Expenses continued

## Medical expenses

- **Celiac** – an additional grocery amount may be considered with a note from a doctor confirming you have celiac disease.
- **Diabetic supplies** – **report how many times you test your blood.** If you test four or more times per day, attach a note from your doctor.
- **Hearing aids** – a maximum of \$1,200 will be considered for each hearing aid, less the portion covered by Alberta Aids to Daily Living for the first hearing aid. Provide an estimate or receipt stating the amount covered by the Alberta Aids to Daily Living program.
- **Medication assistance** in lodges or Designated Assisted Living – need documentation from the facility stating the monthly fee and the effective date. Maximum \$50 per month.
- **Nutritional Beverage** – provide a doctor's note prescribing the nutritional supplement and stating how many cans are needed on a daily basis and the period of time. You may be asked to submit your receipts after three month of use.
- **Personal emergency response system** (e.g. Lifecall, Lifeline, Good Samaritan TeleCare). Estimate or receipt needed.
- **Prescription medications** – assistance is provided for a portion of the co-payment amount for prescription medications only (over

the counter medications are not funded). Funding is only provided for the amount you pay above \$45 per month (\$90 if a couple). Benefits are provided for the current year only. **Your previous 12-month prescription printout from your pharmacist is needed to determine your anticipated prescription costs during this benefit year.**

- **Podiatrist** – a maximum of \$20 per month is considered for regular maintenance (nail trimming and callous removal). Receipts must be provided.

## Medical trips

**Only medical trips greater than 100 kilometers return trip for a serious medical condition requiring numerous trips (such as cancer or dialysis treatments or heart condition) will be considered.** A report from the specialist stating the dates of the appointments must be provided.

Medical trips are funded based on a per diem amount taking into consideration distance traveled, transportation costs, meals, and parking. It is not necessary to submit receipts for these items.

However, receipts **must** be provided for overnight accommodation costs to be considered. A maximum amount will be applied. It is expected that appointments be made, whenever possible, so that overnight accommodation is not necessary.

# Secondary Expenses

**Appliances** – Includes purchase of an appliance only.

Does not include repair of an appliance.

Appliance	New	Used	Notes
Dryer	\$500	\$150	Washer & dryer may be applied for together
Microwave	\$200	\$75	
Television	\$400	\$150	
Vacuum	\$300	\$150	
Washer	\$600	\$200	

*All appliance/furniture amounts include GST, delivery and installation/hook-up.*

## Home repairs

- **Eaves, soffit and fascia** repair. Maximum amount \$1,000.
- **Exterior doors** – \$400 will be funded for each door (maximum 2).
- **Roof repair** – garage only (house funded under Primary) – basic repair on a garage, 20 or 25-year asphalt shingles only (no cedar shakes, slate shingles, tile shingles or roof modifications). No funding for pine shake removal. Maximum amount \$800.

## Housekeeping/yard maintenance

### Maximum \$100 per month

Assistance is provided for housekeeping/yard maintenance, if a documented mobility/health condition does not permit applicants (and spouses/partners) to do their own. A doctor's letter is needed. Receipts must be provided. (See next page for an example.)

Benefits are provided for the current benefit year only. Past receipts are used to determine

your anticipated costs during this benefit year. Applicants living with or paying family members are not eligible for funding under this category. Seniors residing in a lodge or Designated Assisted Living are not eligible for funding of this expense.

## Laundry costs

Seniors living in a lodge or Designated Assisted Living or long-term care facility may receive assistance with laundry costs. A single senior is funded \$35 per month, and a couple is funded \$50 per month.

## Medical expenses

- **Ambulance** – funding provided for only that portion above Blue Cross coverage.
- **Orthotics/orthopedic shoes** – provide a copy of the doctor's note prescribing the orthotics/orthopedic shoes and a copy of the estimate or receipt. Must be custom-made. Off-the-shelf shoes are not considered. Maximum two pairs of orthotics in a lifetime. Maximum \$400 each.



# Secondary Expenses continued

## Respite care

Respite care (relief for a caregiver) is provided to a senior who lives with a spouse/partner or family member who provides daily care.

The senior must have a medical condition warranting respite care. A maximum of two weeks, two times per year will be considered. A receipt from the facility is required.

## Do Not Submit the Following Information With Your Application

- **Utility bills.** If needed, they will be requested when your application is reviewed.
- **Receipts for vehicle repairs.** Vehicle costs are not considered.
- **Individual prescription receipts.** A prescription printout from your pharmacist must be provided only if you are claiming more than \$45 per month.
- **Receipts older than 12 months** prior to the application date.
- **Grocery receipts.**
- **Receipts for spouses** under 65 years of age.
- **Items purchased** out of province.
- **Items that cost** more than \$5,000, unless you also provide proof that you can pay the amount above \$5,000. Proof may be a statement from your bank that you have the funds or a loan is being provided or a letter from someone who is giving or lending you the additional funds.

### Example of an acceptable housekeeping/yard maintenance receipt

Service provider/company name

Address

Telephone number

Sold to: Senior's name and address

Breakdown of service provided (housekeeping, grass cutting, etc.)

Date of service and hours - cost per hour - total cost

# Expenses Not Considered

The following expenses are NOT considered for funding by this program:

## Appliances

- Air conditioner
- Dishwasher
- Entertainment centres (DVD/Stereo/VCR players)
- Freezer
- Trash compactor

## Debt

Debt is not generally an allowable expense. However, Special Needs Assistance for Seniors will consider allowable expenses incurred within 12 months of the date of the application, if:

- the expense was not considered on a previous application,
- the applicant was 65, and
- the applicant had a current application with the Alberta Seniors Benefit program when the expense was incurred.

Also, if you have a special circumstance that has caused you to be in debt, this should be explained on your application form so that it may be considered when your application is assessed.

## Farming/business/rental expenses

## Furniture

With the exception of a bed and a television, funding is not provided for any kind of furniture (eg. tables, chairs, bookcases, recliners, dressers, etc.)

## Non-essential home repairs

- Additions to home
- Air conditioning
- Basement development/repairs
- Concrete sidewalks, driveways, cement pads
- Condo fees or reserve fund costs
- Decks
- Doors – interior, storm, patio
- Drywall
- Flooring – linoleum and carpet replacement
- Fencing – repair or replacement
- Foundation repair
- Furnace filters for allergies
- Garage repair
- Home adaptation for disabilities [Please refer to Residential Access Modification (RAM), Home Adaptations for Seniors Independence (HASI), and Residential Rehabilitation Assistance Program (RRAP). See the Contacts section for contact information.]

*Continued on next page...*

# Expenses Not Considered continued

## Non-essential home repairs (continued)

- Home security systems
- Humidifier/dehumidifier
- Insulation
- Kitchen/bathroom renovations
- Landscaping/gravel – also will not consider removal, pruning, or trimming of vegetation or gardening supplies
- Natural gas conversion
- Painting – exterior/interior
- Pine shake removal/replacement
- Shed/outbuilding repair
- Siding
- Upgrades or renovations are not considered
- Water softener, iron remover, reverse osmosis, or any other water purification system
- Windows

## Insurance

## Legal/professional fees

- Accountants
- Income tax preparation
- Lawyers
- Power of Attorney/Personal Directives
- Wills

## Medical expenses

- Acupuncture
- Bandages, casts, braces, splints
- Blood pressure monitors
- Chelation therapy
- Chiropractor
- Day support programs
- Hearing aid batteries
- Incontinence supplies – contact Alberta Aids to Daily Living program
- Massage therapy
- Medical equipment (e.g. Broda chairs, alarm mats)
- MRIs or other health procedures that an individual has chosen to pay for
- Natural health products (herbal products, homeopathic preparations, and vitamin/mineral supplements)
- Optional eye surgery or lens implants
- Oxygen supplies
- Scooters
- Synvisc/Neovisc/Orthovisc
- Walkers/Wheelchairs (manual or motorized). Please contact the Alberta Aids to Daily Living program.

## Moving expenses

## Other services

- Dry cleaning

*Continued on next page...*

# Expenses Not Considered continued

## Recreation/entertainment

- Alcohol
- Bingo/lotteries
- Books/newspapers/magazines/subscriptions
- Celebrations/parties
- Donations – charity or church
- Exercise equipment/classes/fees
- Gifts
- Membership fees
- Movie/theatre tickets
- Pet supplies
- Restaurant meals
- Tobacco/cigarettes
- Vacations/trips

## Servicing lots

The program will not assist with the cost of bringing utility services to a property or into the house.

## Vehicle expenses

The program will not assist with the cost of vehicle payments, leases, or vehicle repairs.

# Special Circumstances

**The following are special circumstances that may affect the assessment of your application.**

## **Estates**

Estates of a deceased senior are not eligible to receive reimbursement for expenses that a senior incurs prior to his/her death.

## **Seniors in a long-term care facility**

If you are a senior couple which has been involuntarily separated because one of you is residing in a long-term care facility, ensure that you have contacted the Income Securities Program to ask about updating your marital/cohabitation status to involuntary separation under the Guaranteed Income Supplement (GIS) program. GIS may consider you and your spouse/partner single seniors, if it is to your financial benefit. You must complete the involuntary separation with the Income Securities Program before applying to the Special Needs Assistance for Seniors program.

## **Spouses under 65 years of age/ dependants**

The program is for seniors 65 and over. Assistance is not provided for spouses under 65-years old nor for dependant children or grandchildren. Other programs and services may be available to assist these individuals.

## **Travel out of the province**

If you traveled out of the province or expect to travel out of the province during the benefit year, you are not eligible for benefits.

However, if you explain the reasons for your travel, the period of time that you were or expect to be out of the province, and provide proof of how you paid for the travel, your application may be considered on a case-by-case basis.

## **Trustee/Power of Attorney**

This area on the application form only needs to be completed if someone has been designated as your legal Trustee/Power of Attorney. Please provide authorizing documents, if they are not already on file with the Alberta Seniors Benefit program.

## How Will Your Payment be Made?

**If you qualify** for a Special Needs Assistance benefit, you will receive a letter stating what the benefit is for and a cheque to cover the amount approved. The maximum benefit provided is \$5,000, and the actual amount received depends on your income and the expenses requested.



# Appeal Process

**If your request for benefits is denied** or if you disagree with the amount of benefits you receive, you can appeal the decision. Before you decide to appeal a decision, you must first contact the Special Needs Assistance for Seniors program to provide any new related information and to obtain a complete explanation from the assessor.

**If you disagree with a decision** made by the program, call the Seniors Information Line toll-free at 1-800-642-3853 or 427-7876 in Edmonton, to follow the appeal order:

Step	Action	Special Needs Assistance for Seniors
1	Telephone	Assessor
2	Write	Director
3	Write	Assistant Deputy Minister
4	Submit <i>Notice of Appeal</i> form	Citizens' Appeal Panel

**An independent committee** of three private citizens called a Citizens' Appeal Panel hears a Step 4 appeal. These are independent appeal panels and their decisions are binding on both the Special Needs Assistance for Seniors program and the senior who is making the appeal. Please call toll-free 1-800-642-3853 or 427-7876 in Edmonton to have a Notice of Appeal form sent to you.

**An appeal** should be received by the program within three months of the date on the letter from Special Needs Assistance for Seniors advising you of the decision on your application.

# Protection of Personal Information

**The personal information** collected on the application form is collected for the purpose of determining eligibility for the Special Needs Assistance for Seniors program. The information will not be disclosed to any other person or organization except as authorized by the *Freedom of Information and Protection of Privacy Act*.

**For more information** on the collection, use, protection and disclosure of personal information, please write or phone:

## **Freedom of Information and Protection of Privacy Coordinator**

Alberta Seniors and Community Supports  
Seniors Services Division  
PO Box 3100  
Edmonton, Alberta T5J 4W3

Phone: Toll-free: 1-800-642-3853  
or Edmonton area: 427-7876.

# Alberta Seniors and Community Supports—Contacts

## **By Phone**

- Office hours are 8:15 a.m. to 4:30 p.m., Monday to Friday
- From any location in Alberta: call toll-free 1-800-642-3853
- In Edmonton and area: call 427-7876
- Deaf or Hearing impaired with TDD\TDY units: call 1-800-232-7215 (427-9999 in Edmonton)

## **By Mail**

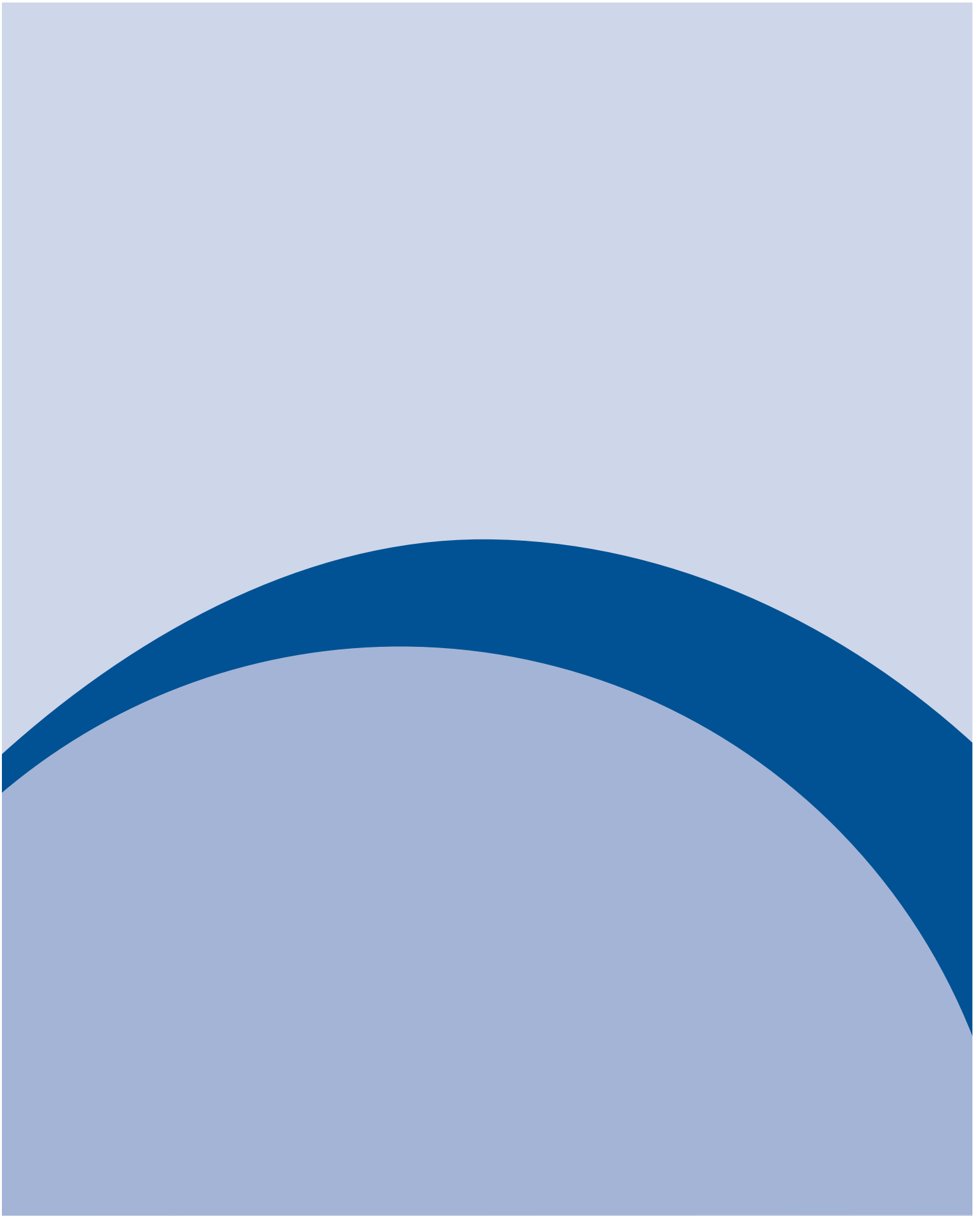
**Special Needs Assistance for Seniors**  
Alberta Seniors and Community Supports  
PO Box 3100  
Edmonton, Alberta T5J 4W3

## **By Fax**

(780) 422-5954

## **By Internet**

[www.seniors.gov.ab.ca](http://www.seniors.gov.ab.ca)



[www.seniors.gov.ab.ca](http://www.seniors.gov.ab.ca)

**Special Needs Assistance for Seniors**  
Alberta Seniors and Community Supports  
PO Box 3100  
Edmonton, Alberta  
T5J 4W3