

## Appointment Scheduling Process (Form 4)

### Benefits Specialists:

1. Please fill out Form 4 for each client referred to you by the Connect to Work Center.
2. Fax Form 4 back to Martha (860) 679-8023 once it is complete.
3. If the person did not receive benefits counseling, fax after the client refuses to participate or 6 days after the "Can't reach you" letter is sent.
4. Please circle only one response for each question. If you have any questions, please call Martha at (860) 679-4275. Thank You!

UConn ID: \_\_\_\_\_

Client First name: \_\_\_\_\_ Client Last Name: \_\_\_\_\_

1. Was benefits counseling completed with this client?  
1 Yes  
0 No
2. How many times did you meet with this client to complete their benefits counseling?  
\_\_\_\_\_ number of times met with client
3. How much total time did you spend providing benefits counseling for this client? If you met more than once, please add up the time spent for all appointments.  
\_\_\_\_\_ minutes
4. How many times did you attempt to reach client to try to schedule their benefits counseling?  
\_\_\_\_\_ calls
5. Did this client ever not show up for a scheduled benefits counseling appointment without calling you first (a "No Show")?  
1 Yes  
0 No
6. Was a "Can't reach you" letter sent to this client?  
1 Yes – Date sent out: \_\_\_\_\_  
0 No
7. Was there any response to the "Can't reach you" letter?  
1 Yes – Please describe: \_\_\_\_\_  
0 No
8. For clients who will no longer be contacted, please circle explanation or describe below:  
1 Client refused to participate in benefits counseling  
2 Client refused to participate in Benefits Offset Project  
3 Client did not call back after 3 or more messages and did not respond to "Can't reach you" letter  
4 Client missed 2 or more scheduled appointments  
5 Other – Please describe: \_\_\_\_\_