



# CASEWORK NAVIGATOR

Give your team the tools they need to excel at casework.



## CASEWORK BASICS

### DATA-DRIVEN CASEWORK

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developed by



in partnership with  
Alexandra Mannerings, Merakinos

# DATA-DRIVEN CASEWORK

*developed in partnership with Alexandra Mannerings, Merakinos*

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# INTRODUCTION

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Through the day-in and day-out rhythm of casework, it can be hard to take a step back and assess how the hard work is paying off. What’s working? What could work better, and how should the casework team make that happen?

Developing a strategy to leverage data in casework is one way to help answer these questions. While data-driven casework may sound like it precludes the emotional side of casework, data used wisely can actually be a tool to help productively uncover and address the emotional demands of the job, and to bring everyone on the team together on the same page to make smart decisions.

Data is also not necessarily highly tech- or math-intensive—many of the most valuable metrics may be qualitative, or easily-counted by any member of the team with any skillset.

In this chapter, we’ll cover a framework for integrating data into casework operations and some best practices for measuring common casework metrics.

## ABOUT MERAKINOS

Alexandra Mannerings founded her analytic education and consulting company, [Merakinos](#), to help social enterprises and non-profits harness the power of data. A decade of measuring what matters in low-resource environments from Ghana to India has taught her how to ask impactful questions even if it’s just you in the wilderness.

Merakinos can be translated as “soulful thought” or “heartfelt logic.” Meraki comes from the Greek concept of pursuing something with heart, soul, and creativity. Nos refers to logical thought or knowledge that comes from deduction. Blending together human ingenuity, wisdom, and hard-earned experience with targeted analytics and the right data can help us achieve our goals faster and far more effectively – and it is at the center of all that Merakinos does.



*Alexandra Mannerings, founder of the analytic education and consulting company, [Merakinos](#)*



# DATA DECISIONS: THE EMOTE METHOD FROM MERAKINOS

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With big responsibilities and limited resources, casework teams make difficult decisions about how to operate every day. For many caseworkers, there can be a lot of doubt in those decisions: Are we doing the right thing? Are we having an impact? What can we do better?

While tracking data is not a magic wand that will automatically provide clear direction and outcomes, data can be an invaluable tool to help casework teams navigate these questions, make decisions that reflect their mission and values, remove bias, and bring multiple stakeholders together on the same page.

Data cannot be extricated from the larger work of strategy, evaluation, and planning that is key to a successful casework operation. To approach this larger context, data scientist, scholar, and consultant Alexandra Mannerings proposes the “EMOTE” framework for working with data. EMOTE stands for:

- **Eden:** the goal or destination your operation is trying to achieve,
- **Morals & Mitigation:** the values driving your team’s work,
- **Options:** the potential courses of action your team may be weighing,
- **Triangulate:** the process of balancing your values, options, and goals, and
- **Evaluate:** observing what happens after making a decision, and re-starting the cycle if necessary.



# Eden: The Ideal Casework Operation

What's important to the casework team? In an ideal world, what would casework look like for this team in this community?

This is not a vision that a casework team can create in a vacuum: casework goals and priorities are developed in conversations with the Member, constituents, caseworkers, local stakeholders, the rest of the office, and more. They are also constantly evolving as local needs and the nature of casework itself changes.

However, for most teams, the vision of an ideal casework operation will include specific ideas and goals for:



- Constituent experience interacting with the office,
- Casework outcomes,
- Local awareness of the casework team's services,
- Team's local reputation and ability to build trust,
- Team's ability to contribute to other parts of the office's work, like communications, legislation, and oversight,
- Team's ability to proactively solve casework requests through preventative/educational communications,
- Team's ability to attract and retain talented staff,
- and more.

Many of these facets of the vision may not be possible with the team's current resource constraints—and that's okay! Having a clear guiding vision will help the team take small, incremental steps toward improvement.



# Morals & Mitigation: What About the Process is Important?

Morals are the values to uphold, and mitigations are the possible outcomes to avoid. Taken together with the team's resources, they encompass the scope of what's possible to achieve.

For example, two values that teams may prioritize are: 1) caseworker safety, and 2) accessibility for constituents. To maximize accessibility, the team could consider setting up a home visit option for casework intake, where caseworkers travel to meet constituents where they are. However, to also make sure that this operation does not unduly endanger caseworkers entering unfamiliar and possibly hostile situations, the office would also need to heavily invest in training, equipment, and procedures similar to many other first responder roles to make sure caseworkers are equipped to handle home visits in a safe manner. Given the resource demand required to ensure caseworker safety, offices may decide to seek alternative options to the home visit idea, even considering its merit to advance the value of accessibility.



A clear understanding of the scope of resources available is a vital part of making data-driven decisions in casework. Most casework teams start with a fixed number of employees assigned to casework, and a cultural expectation of how many hours per week those employees work. However, depending on conditions in the district, these may change: many offices temporarily or permanently reassigned employees to casework to help keep up with the dramatic spike in demand during the pandemic; some new offices also start with a greater proportion of outreach staff who transition to more casework-focused portfolios as the office becomes established (or vice versa). Other resources that limit and enable potential options include office space, vehicles, budget, temporary employees, and other demands on caseworker time.

Once again, while caseworkers will have the most appropriate on-the-ground insight, questions of resources and values are developed with a network of stakeholders, starting with the Member and the rest of the office.



# Options: What Can You Experiment With?

With a destination (Eden) in mind, options are the potential routes the casework team may take to get there. While sometimes options are pre-set by leadership and circumstances, brainstorming options to solve a problem as a group can be a powerful way to tap into caseworker expertise and creativity.

For example, a casework team looking to make progress toward a goal of more awareness of casework services might sit down to brainstorm. Options may include:

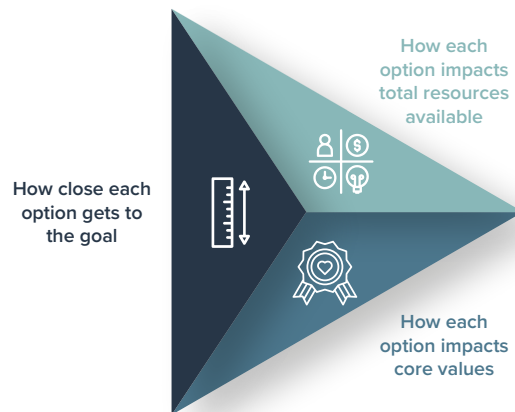
- The team could do remote office hours as a full team, dividing the work of organizing between four people—but this leaves the main district office without casework support during office hours.
- The team could do remote office hours individually—but this may raise safety and constituent experience concerns if the individual caseworker gets overwhelmed.
- The team could train interns or temporary fellows to handle tabling and intake at remote office hours, letting casework staff remain in the office—but then constituents may not appreciate being handed off between multiple people, and the quality of constituent experience may vary.
- The team could do in-person remote office hours in community centers, limited to specific communities of focus—but other communities may feel left out.
- The team could offer virtual office hours and target outreach to specific areas—which would cut back on the workload of room booking and transportation, but also be less accessible for constituents who are not comfortable on Zoom.
- The team could do a round of door-to-door flyering to advertise the casework team’s services—which would be extremely labor intensive but time-limited.
- The team could send a round of direct mailers to constituents in the targeted area—but this may have significantly less impact on stakeholders and local leaders like city councilors, senior center leadership, veterans service officers, and more who will play a role in future referrals.
- The team could work with comms to place additional casework content in the media and on social media—but this requires a bought-in comms team and process for soliciting constituent stories.



# Triangulate: Here Comes the Data

Once all of the options are on the table, triangulation is deciding on a course of action using the “Eden” vision, team’s morals, and things to mitigate. All three are vital for making informed, sustainable decisions: cost-benefit analysis that does not take values into account may lead further away from a casework team’s goal; alternatively, benefit-value analyses that do not take cost into account may create operations that are fundamentally unsustainable.

This phase is where data plays a vital role. Triangulation requires gathering and monitoring at least three basic points:



Deciding what to measure and how to measure it will depend on the casework team’s goals and values (and, as covered later in the chapter, other office processes). This manual chapter will cover sources of casework data in more depth below, but it is worth noting that there are myriad sources of data on casework that will help teams triangulate to make decisions—including both quantitative and qualitative data, gathered through an office’s Constituent Management System (CMS) and otherwise. For example, some examples may include:

- Quantitative data:
  - » CMS: Ratio of cases opened to cases closed over a period of time
  - » External: Time per intake call
- Qualitative data:
  - » External, constituents: free-response section on a constituent satisfaction survey
  - » Internal, casework team: 1:1 interviews between casework manager and caseworkers on burnout, compassion fatigue, and job satisfaction

In some cases, helpful data may not even be something that a casework team needs to gather on its own, but can find using some of the vast resources available to Members of Congress—for example, drawing on detailed demographic data available through the Census to determine whether there are populations currently not well-represented in a casework team’s portfolio, and then using that information to determine areas where the team may want to prioritize casework outreach.





# Evaluate: How is Your System Working?

Finally, after making a decision, data also helps evaluate that decision and any lessons learned. Was the team's guess on which option would get closest to the goal correct? If not, why not? Did trying an option shed any light on the initial goal that the team should think about when trying other future options?

Ideally, this is an iterative process: teams may decide that options are not mutually exclusive, but sequential, where the team starts by trying one option, then trying another option, and comparing results. It's also important to decide on time frames for evaluation that give an option enough time to "work" properly before making a decision.

It's also important to make sure that goal-setting, brainstorming options, and evaluation are all part of the same ongoing conversation: in a competitive political environment, it can be easy to see "unsuccessful" metrics as a sign of failure instead of as a data point to help make decisions and assess long-term goals and strategies. Keeping evaluation conversations productive requires constant restating and reaffirming the previous steps of the framework (Eden, Morals/Mitigation, Options, Triangulate) with everyone involved in that evaluation.



# CASEWORK DATA “CUSTOMERS”

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Casework teams are not the only “customers” who can make use of the casework data. Casework teams are also producing data for colleagues on their legislative and policy teams, comms teams, and team leadership. Legislative staff may find it helpful to use casework data in oversight activities and communication with agencies; communications staff may be interested in casework stories and success metrics as a way to talk about the Member’s commitment to the district or state; and team leadership may find it helpful to monitor and evaluate casework data to inform resource allocation.

Working productively with these functional teams requires ongoing conversations about each team’s “EMOTE” framework: what are each team’s individual goals, and how does casework fit into them? What types of data from casework can be helpful?

For example, for legislation, a team’s “Eden” may be to run an impactful legislation program that demonstrates their Member’s independence from political partisanship and maximizes opportunities related to the Member’s seniority on the VA Committee. In this case, the legislative team may find data on veteran-related casework extremely helpful to help set priorities, and give context to agency communications. Working collaboratively with the legislative team to determine what kind of data is helpful, as well as its format and frequency for presentation, will help make sure that the casework team’s work is valued and actually used.

However, as a cautionary note: traditional casework metrics (like case open/closed rates or money returned to constituents) tend to highly value visible “success” metrics without encouraging much intentionality about how they fit into operational casework decisions. There is no one right way to do casework, and no one right way to gather and share public casework data. Sharing a specific metric because other offices are doing it misses a chance for casework teams to thoughtfully tell their casework stories, and what they value and try to accomplish for constituents through casework.

For more information, see our [Casework Navigator](#) chapters on [Legislation and Oversight](#) and [Closing Cases](#).



# SOURCES OF CASEWORK DATA

For most teams, relevant metrics fall into three broad categories:

- **Performance Metrics:** data that relates to the casework team’s service to constituents;
- **Oversight Metrics:** data that relates to the types and substance of cases that the casework team handles, and
- **Constituent Satisfaction Metrics:** data that relates to the constituents’ perception of their experience with the office.

Offices are strongly encouraged to contact their CMS vendor to determine options for customizing casework tracking, and to consider casework data and case management in choosing and renewing a CMS vendor.



Ideally, caseworkers should be constantly updating data on their cases to give offices as close as possible to real-time information. Casework teams that make good use of their data for planning and case management will have a built-in incentive to close cases in the CMS as the case is resolved. Particularly for CMS systems that do not allow closed cases to be edited, it is also important to take a moment at the end of a case to make sure that all metrics are correct.

## Performance Metrics

Casework performance metrics offer important internal insights to the casework team and are increasingly being used to demonstrate a member’s effectiveness in delivering services to constituents. To create an accountable tracking system, teams may consider keeping the following principles in mind:

### Transparency

If an office decides to list performance metrics on their Member’s website or in communication with constituents and journalists, it is strongly recommended to provide information on how the team measures those statistics. This may be a linked website page or information available on request.



## Comparability

Casework demand varies widely between districts within states and between states across the country. To account for discrepancies that may not reflect the casework team's efforts, casework teams should consider using and reporting metrics that can be expressed as percentages or per capita numbers rather than as raw numbers which may not accurately reflect the efforts of the team and its individual members. For example, percentage of cases resolved within 30 days.

## Clarity

Casework metrics should be clear on the unit of analysis and level of service they relate to. For example, if a casework team receives one hundred direct constituent requests for help in a year, but only 60 of those are actionable, federal casework where the constituent returns a Privacy Act Release Form, then it could be misleading to advertise that the office closed 100 cases (even if those cases are all "closed" in the CRM)—whether for an internal or external audience. However, it would be accurate to report that the casework team served 100 constituents.

# Common performance metrics

Many offices prominently highlight their casework team's performance metrics in public-facing materials. However, without comparable standards to measure performance between offices, these decontextualized numbers can produce some skepticism among constituents and journalists—and penalize offices that measure their impact more conservatively.

The following standards are starting points for offices to develop internal standards for measuring casework team work.

## Cases Open/Closed

Cases counted in the team's open/closed numbers should be clearly defined as cases where the caseworker has opened an initial inquiry with an agency. Cases where the constituent does not return a PRF or does not respond to contact after initial outreach are not typically counted as closed cases.

## Referrals Made

Offices that value and spend time on non-jurisdictional cases should establish a category to count and report referrals separately. Depending on the CMS used and the practices of the individual offices, these might be counted as mail records or created as cases, coded as referrals, and excluded from the case closed count.



## Money Returned

Caseworkers make an impact by returning money to the local economy that otherwise would have been directed elsewhere. By that definition, it is most appropriate to track money that would not have been paid out without the involvement of the Congressional office. In reality, this is a limited number of cases.

Teams should consider how they will count, track, and distinguish among the following types of cases involving payments to individuals:

- **Retroactive payments or settlements returned as a result of the inquiry:** typically these payments result from a reconsideration or a similar process that would likely not have happened without the office's intervention. This should only include money received by the time the case closes.
- **Retroactive payments or settlements paid out more timely as a result of the inquiry:** many of the most important casework "wins" involve helping expedite payments in cases of dire need such as a delayed tax refund, or a retroactive Social Security or VA compensation payment. These payments are important and valuable, but if they would have been paid out eventually, the office should be transparent about how they are included in the total amount of money returned.
- **Future benefits:** the future payments made once a case has been decided, such as monthly VA compensation or Social Security Disability (SSDI) payments are another important "win" for the office. However, there is no accurate way to determine the long-term value of those payments, even if they would not have been made without the involvement of the casework team.

The office should also consider whether casework statistics will include funds paid out to businesses and nonprofit organizations such as funding that is "stuck" due to a bureaucratic grants issue or a tax refund to a business.

In general, statistics on money returned through casework should also not include money brought into the district through other programs like Community Project Funding/ Congressionally-Directed Spending or through federal grants, but the team should consider how else they may wish to track and report these numbers.



## Favorable/Unfavorable Cases:

Many CMS vendors have an option for offices to note cases closed as “favorable” or “unfavorable.” This can be tricky to assign, as some constituents will be very happy or unhappy with the office’s service entirely separate from the outcome of their case. Because of the subjective nature of this question, in general, this metric will likely be most useful for the office’s internal and oversight tracking on which agencies tend to have more favorable resolutions than others.

If offices still want to track and report favorable or unfavorable case closing, assigning case closed status should focus as narrowly as possible on whether the constituent’s original request was met.



Alternatively, offices could consider publicizing similar data from constituent feedback (more below): for example, percentages of constituents who identified their case outcome as favorable, or percentages of constituents who would recommend the office’s services.

Finally, it is difficult to talk about casework metrics without talking about workload management and portfolio assignments. As the team considers the metrics for internal and external reporting, it is important to remember (and remind office leadership) that some types of cases are inherently quick to resolve and with a high likelihood of success (e.g. passports), while others may take much more time and have a lower likelihood of a favorable outcome (e.g. military discharge upgrades or certain immigration cases).



# Oversight Metrics

Setting standards to track the substance of casework issues allows offices to compare programs and observe trends in constituent experience across multiple agencies. This is the kind of data that will be especially useful to the DC team when they are looking for legislative insights or they want to include examples in member testimony or oversight letters. Making it easy to access this type of data can help everyone's sanity when that information is requested in a time-sensitive situation.

Each CMS vendor has a different system for tagging and categorizing cases. New offices are strongly encouraged to ask their CMS vendor for a briefing on which agency tags come standard, and how far an office can customize tags within their platform to track more granular data, including cases that involve multiple agencies.

At a minimum, offices will likely find tracking the following helpful:

## Agency

Overarching agency responsible for the case; usually a cabinet-level agency or an independent agency. For example, Social Security, or Department of Transportation.

## Program

Specific program or problem the constituent is facing; for example, Social Security Disability Insurance (SSDI): Financial Eligibility, or USPS: Mail Delay.

## Problem

In broad strokes, what is causing the issue; for example, SSDI - Medical Eligibility, or SSDI - Financial Eligibility.

## Processing Centers/Field Offices

Monitoring specific offices associated with cases can help track and organize agency contact information and monitor potential trends or problems in field office performance. For example, Social Security: Cleveland West office, or Veterans Benefits Administration: Philadelphia Pension Management Center.

## Dire Need/Expedited

Most agencies will have a set of criteria that qualify constituents for expedited processing. These are usually fairly standard, including homelessness, imminent eviction or foreclosure, medical emergencies, or the constituent's inability to pay for food and medication. However, exact criteria do vary by agency, so it is important to double check.



## Additional Tags

Additional tags may further dive into topics of interest to the office, including qualities of particular cases that may not line up with specific programs.

For example, an office interested in studying erroneous payments may consider setting up a separate tag to note overpayments across multiple agencies.

Some offices may also find it helpful to tag cases that are associated with specific events: for example, cases related to the Afghanistan withdrawal, or small business owners affected by the pandemic. Grouping these cases may also be helpful to be able to remove unusual spikes in casework demand from long-term data on casework.



Some offices may also find it useful to track some basic demographic information related to the constituent: for example, the Privacy Act Release Form could be customized to give constituents the option to identify their gender, ethnicity, veteran status, education, and more. This information may help offices start to pinpoint equity issues in federal programs, as well as help casework teams ensure that they are reaching a representative sample of constituents.

For offices using CMS vendors that do not allow for these formal levels of tracking, it may be helpful to explore supplemental or alternate methods of tracking constituent data, like shared spreadsheets. Keep in mind that however the data is tracked, care should be taken to avoid double counting cases if they are coded with multiple case tags.





# Constituent Satisfaction Metrics

The final potential source of information an office can use to evaluate their performance at the conclusion of a case is feedback directly from the constituent. Constituent feedback can:

- provide context for other performance and oversight data,
- identify areas for improvement,
- provide qualitative data to use in communications about the member’s work and in oversight,
- identify constituents who may be eager to tell their stories in a Congressional hearing or be featured in other communications.

For most offices, the most simple and straightforward way to solicit constituent feedback is through a survey emailed to the constituent when their case is finished. This method is not perfect: it will tend to overrepresent the more tech-savvy constituents, as well as those with high levels of reading and English proficiency. Survey response numbers also tend to be fairly low, so offices should be cautious of response bias from constituents taking the time to respond. Seeking constituent feedback is an area ripe for experimentation and innovation with new technologies.

Some CMS platforms may have the capacity to conduct surveys; if not, there are plenty of free or low-cost options available. If using a survey platform separate from the office’s CMS platform, teams will need to develop a process to pull lists of constituents to survey, and then match up feedback on surveys with cases in the CMS.

Ideally, surveys will be short, and take less than ten minutes to complete. Excellent guidance on writing survey questions is available from many sources, including the Pew Research Center and survey platforms like SurveyMonkey.

Key to getting the most out of survey questions is also making sure that the format matches what the team wants from the responses: most questions will be most helpful asked in a multiple-choice format that makes it more likely the constituent will respond, and easier to pull actionable statistics. However, questions where the team would like to solicit a quote to share require a more open-ended question like “is there anything else our team should know about your casework experience?” Open-ended questions may not just be helpful for quotes, but can also give constituents space to be heard and to surface suggestions or observations teams may not have thought of. For example, asking “what do you wish you had known earlier in your case?” may solicit thoughts on the agency process as well as the casework team’s work. Introductory text should also make it clear if the office will share constituents’ responses, and consider giving constituents an option to opt out of having their responses shared to encourage candid observations.

The survey should also indicate to the constituent whether their responses are [anonymous or will be attributed to them](#).



# Using Casework Data Metrics for Continuous Improvement

Returning to the EMOTE Framework, offices will ideally use the data gathered on performance metrics, oversight metrics, and constituent satisfaction metrics to continuously evaluate and improve operations.

Offices that survey constituents for feedback should also make a plan to review that feedback regularly and incorporate it into the team's workflow. This may include going over specific feedback for caseworkers in 1:1s with managers, including constituent feedback in any regular casework reports to the Member and/or legislative team, and selecting quotes for the communications team to use in external communications.

When asking the casework team to spend time tracking and updating case data, it is important to be transparent about how that data will be used and to allow the team members input into the data-driven decisions. For example, if case open and closing data is used to measure caseworker performance, it may be helpful for the team members to be involved in decisions about allocation of cases or to have an opportunity to review and explain any discrepancies.

When casework data is used for oversight purposes, it is always helpful to involve the caseworker with the subject-matter expertise before sharing trend data with the public or the press. Caseworkers will be most familiar with the context of the issues driving the trends. They will also be most familiar with any individuals who might be tapped to showcase a policy issue and can offer needed context to any testimonials.



# SAMPLE CASE TAGS LIST

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Your office's method of tracking cases will depend on the available features from your CMS platform. In general, for large programs where casework teams will see the majority of cases, it will be more helpful to develop more granular case tags that track programs and problems within programs; for smaller programs or less frequent cases, it may be helpful only to include the overall agency or program. This list also does not include processing centers, field offices, and other agency locations that may be helpful to track.

A starting point list may include the following types of cases. To suggest additional case tags, please email [info@popvox.org](mailto:info@popvox.org).

## General

- Expedited/Dire Need
- COVID-19
- Other event-related [e.g. related to a local natural disaster, economic catastrophe like a mass layoff, etc]

## Department of Defense

- Program
  - » Air Force
  - » Army
  - » Army Board of Correction of Military Records (BCMR)
  - » Defence Finance and Accounting Service (DFAS)
  - » Defense Security Service
  - » Marine Corps
  - » Military Entrance Processing (MEPS)
  - » National Guard
  - » Navy
  - » Space Force
  - » TRICARE
- Problem
  - » 15-6 investigation
  - » Concurrent Receipt (CRSC/CRDP)
  - » Discharge upgrade
  - » Disciplinary proceedings
  - » Enlistment
  - » Medals earned in service



- » Military record changes
- » Survivor Benefit Program (SBP)

## Housing

- Program
  - » Section 8
  - » VA Supportive Housing (VASH)
  - » Government-Backed Mortgage
- Problem
  - » Affordable housing search
  - » Eviction
  - » Foreclosure
  - » Mortgage issues (other)
  - » Sec 8 waiting list
  - » Sec 8 landlord compliance
  - » Sec 8 other problems

## Department of Homeland Security

- Customs and Border Protection (CBP)
- Federal Emergency Management Agency (FEMA)
- US Immigration and Customs Enforcement (ICE)
- Transportation Security Administration (TSA)
- US Coast Guard (USCG)
- US Citizenship and Immigration Services (USCIS)
- USCIS Child Immigration Services
- USCIS National Benefits Center
- USCIS Refugee, Asylum, and International Operations
- USCIS Waiver Form

## Department of State

- Embassy
- Passports
- Special Immigrant Visa
- National Visa Center
- UN High Commissioner for Refugees
- Afghanistan withdrawal



## IRS

- Advanced Child Tax Credit
- Delayed tax return
- Earned Income Tax Credit
- Economic Impact Payment (stimulus check)
- Rebate Recovery Credit

## Medicare

- Program
  - » Medicare Part A
  - » Medicare Part B
  - » Medicare Advantage (Part C)
  - » Medicare Part D
- Problem
  - » Billing
  - » Coverage appeal
  - » Durable Medical Equipment (DME)
  - » Drug pricing
  - » Equitable relief
  - » Extra Help program
  - » Late Enrollment Penalty (LEP)
  - » Medicare-Medicaid dual enrollment
  - » Nursing home care

## National Archives and Records Administration

- Military records search
- Medals earned in service

## Small Business Administration

- Economic Injury Disaster Loan (EIDL)
- Payroll Protection Program (PPP)

## Social Security

- Program
  - » Old Age and Survivors Insurance (retirement benefits)
  - » Social Security Disability Insurance (SSDI)
  - » Supplemental Security Income (SSI)
  - » Social Security Number (SSN)



- Problem
  - » 1099 issues
  - » Appeals Council
  - » Administrative Law Judge appeal
  - » Continuing Disability Review (CDR)
  - » Cost of Living Adjustment (COLA)
  - » Death Benefit
  - » Disability, financial eligibility
  - » Disability, medical eligibility
  - » Overpayment
  - » Payments Center
  - » Retroactive Benefits
  - » Windfall Elimination Provision (WEP)/Government Pension Offset (GPO)
  - » Medicare enrollment

## VA

- Program
  - » VBA-Compensation & Pension
  - » VBA-Aid & Attendance
  - » VBA-Fiduciary
  - » VHA-VA Health Care
  - » VHA-Community Care
  - » Other
- Problem
  - » Compensation Exams
  - » Discharge character
  - » NARA Records
  - » Nursing Home eligibility
  - » VBA-Agent Orange Claims
  - » VBA-Appeals
  - » VBA-Camp Lejeune Claims
  - » VBA-Overpayment
  - » VBA-PACT Act Claims
  - » VBA-SSI/SSDI - dual eligibility
  - » VBA-Aid & Attendance
  - » VBA-Compensation & Pension
  - » VBA-Fiduciary
  - » VHA-Electronic health records
  - » VHA-Emergency Room Visits
  - » VHA-Financial eligibility
  - » VHA-Home care
  - » VHA-Hospice



- » VHA-My HealthEVet
- » VHA-Registries
- » VHA-Prescriptions
- » VHA-Transportation
- » VHA-Community Care
- » VHA-VA Health Care
- » VHA-Medical eligibility
- » Other

## Miscellaneous

- Consumer Financial Protection Bureau
- Department of Commerce, National Oceanic and Atmospheric Administration (NOAA)
- Department of Education
- Department of Justice
- Department of Labor, Office of Workers Compensation Programs (OWCP)
- Department of Labor, Employee Benefits and Security Administration (EBSA)
- DOL Occupational Safety and Health Administration (OSHA)
- OPM annuity
- OPM survivors benefits
- USPS mail delay

## Referral

- Legal Services
- Emergency Financial Assistance
- Homeless Shelter
- Substance Abuse Resources
- Consumer issues/Personal Finance
- Domestic Violence
- State Reps
- Local Gov
- Attorney General
- Law Enforcement

