

Keeping records of this communication is important and may be legally prudent.

TELEPHONE SCRIPT

if you are computer savvy, there are many tasks you can do online, if you prefer to use the telephone, this will help you

Keep track of your phone calls in the Notes section:

write down

- the date
- the time you called
- the person(s) name(s) who helped you
- mark your calendar if you need to follow up (always assume you will need to follow up)

Do all you can to talk to someone immediately. *Sometimes when you call a business, if you press "0", it leads you straight to a live person, it is worth a shot.*

HINT: Never assume someone will call you back (even if they say they will) follow the script here:

use this script for the following:

insurance companies all policies Social Security Administration VA Veteran's Affairs former employers

These entities are examples of organizations where you will need to provide the decedent's social security number and additional confidential information.

You may need to add to this list; you may be able to omit others.

You: "Hello, I need to report a death; can you help me with that?"

If they can help you, great; if not, keep asking this question until someone can help you. If no one can help you, call back again at a later time. Usually they have a script as well and typically it is a very smooth process, but not always. When you find someone who can help you,

You: "May I get your name and will you spell it for me?"

You: "What do you need from me?"

Write down what they need, usually they will ask the social security number, full name, date of birth, info that you have completed in the Decedent chapter. They also typically need an original death certificate for these entities.

original death certificate letter other _____

You: "Where and how should I send this info; and can I send it to your attention?"

-Write down the address (or fax or email address) and repeat it to make sure you heard them correctly

More questions that you may or may not need to ask:

"Is this something I can do online?"

"What else do you need from me?"

"How will I know this is completed?"

"What else do I need to do regarding this?"

"May I have your direct phone number or email if I have a question?"

"May I check online to see if this has been completed?"

"When can I follow up to make sure this is completed?"

*you are free to copy this form
you can also share this and/or download the form at
www.HelpingSurvivorsManage.com*

