Spark Needs Assessment

To see the Needs Assessment in action, check out our full video guide [HERE]

See below for a list of the questions outlined in the Spark Needs Assessment survey.

Questions for Prospects:

1. Personal Info
    a. Birthdate
    b. Contact Information
        i. Email
        ii. Mobile Phone Number
        iii. Home Phone Number
    c. Home Address
        i. Clients can also add in a separate Shipping Address
    d. Medicare Information
        i. Medicare Name (as it appears on Medicare Card)
        ii. Medicare Number
        iii. Part A Start Date
        iv. Part B Start Date
2. Health Insurance
    a. Health insurance type
        i. Plans and premiums
        ii. Estimated time of retiring
3. Prescriptions
    a. Prescription Name - clients can add as many prescriptions as they need
        i. Dosage
        ii. Refill frequency
    b. Local Pharmacy
    c. Mail Order option
4. Providers
    a. Primary Care Physician
    b. Specialists
    c. Indicate if help is needed to find a new provider