National Registry of Rehabilitation Technology Suppliers

Eight Steps for Organizing a Successful Site Visit with Members of Congress and State Legislators

1. **Find the contact information; telephone and fax numbers for your Member(s) of Congress and/or State Legislators by going to www.nrrts.org,:**
   a. Enter your Zip Code in the box in the upper right-hand hand corner and click "Find".
   b. Select the name of your U.S. Representative; repeat for each of your two Senators and/or State Legislators.
   c. Record the information on the "Contact Worksheet" attached to this document
2. **Send a Meeting Request/Invitation**

   Use the attached template to create a letter or/invitation to request a Congressional site visit. **Fax** your letter/invitation to both the **Member's state/district scheduler and DC office scheduler or State Legislative office** at least **three weeks** prior to when you would like the visit to occur. Be sure to call ahead and get the schedulers' names to include on the fax cover sheet.
3. **Follow-up on Meeting Request/Invitation**

   Call the scheduler to follow-up on your request **one week** after you fax your letter.

   Inform the receptionist or scheduler that you are following up on a request for a Congressional visit. Be sure to tell him or her that you faxed the request on [PROVIDE SPECIFIC DATE]. The scheduler may tell you he or she has not received or seen your request. This is not a stall tactic. Their offices receive a lot of requests and other correspondence via fax due to the slow mail situation. Offer to send them a second copy if they cannot locate your request. Be prepared to discuss the event, the logistics, other guests who may be attending, and the specific role of the Legislator for the event.

   If you are unable to speak with the scheduler, ask for her/his voicemail. Be persistent but be patient and polite when working with the receptionists and schedulers.

   Voicemail Message Example:

   Hello, my name is [YOUR NAME] and I am calling from [ORGANIZATION NAME] to follow up on an invitation I faxed to your attention on [DATE]. We would be honored to have the Congressman or Congresswoman join us for a visit to see the impact of complex rehab and assistive technology business on the members of our community with significant mobility impairment. We expect to have a number of clients with disabilities present along with members of the media. You can reach me at [PHONE NUMBER] to discuss further details. I look forward to hearing from you soon. Thank you.
4. **Be Flexible**

   We are asking NRRTS Registrants and Friends of NRRTS to schedule site visits during the 2010 Summer District Work Period for the Senate and House, August 9th thru September 7th; when most Members will be in their home district. If you are unable to secure a visit with the Member of Congress be sure to ask for a staffer to come in the Member's stead. It is important to establish and cultivate relationships with staff members as they have direct contact with the Members.

5. **Confirm your Meeting**
   If you are able to secure a visit, be sure to follow-up with the Member's office. One week before the event, call the scheduler or designated staff person and confirm her/his participation. Get the name and cell phone number of any staffers who will be traveling with the Member on the day of the visit.[1]

6. **Prepare a Briefing Memo**
   Fax a briefing memo to the Member's office one week prior to the visit with all the details including contacts, time, location, phone numbers, agenda, and participants (total number, who will be participating, etc).

7. **Prepare and distribute a Press Release**
   Be sure to distribute a press release on the day of the event. If necessary, NRRTS staff will help you develop the release. The Member and her/his staff will appreciate you working with them to include the Member's participation in any media releases about the visit. Take photographs to document the visit.

8. **Send a Thank You Note[2]**
   Be certain to get business cards from all attendees. Follow up with thank you notes and photos (if available) to the Member of Congress and all the staff members you worked with to set up the visit. Continue to cultivate a positive relationship with the Member's office for future visits and events.

Seven steps to clear, concise and effective messages to Legislators and their Staff

1. **Get comfortable with the message**
2. **Review all available materials.**
3. **Put it in your own words.**
4. **Be specific[3]**
5. **Put a face on the issue[4]**
6. **Always finish with the "Ask for"[5]**
7. **Develop and maintain the relationship[6]**

Additional help:

Contact NRRTS via e-mail to smargolis@nrrts.org or call Simon Margolis at 763-494-6774.

---

[1] Let NRRTS know the date of the visit via e-mail to smargolis@nrrts.org

[2] After the event please let NRRTS know how things went

[3] Provide an overview of the issues and their impact on you, your company and the consumer you serve.

[4] Put a face on the issue. Explain how these issues impact you and other people in the Members district and State. Have a consumer (s) at the meeting/visit to support your positions.

[5] Ask for a follow-up with staff on your issues. Ask the Member to do something specific.

[6] Get contact information for staff members, email, phone numbers and fax numbers. Have you ever voted for this Member? Contributed time or money to their campaign? If so, let them know. If not, now might be a good time to do so.

Talking Points (Cliff Notes Version)
Separate Complex Rehab Benefit Category

- **Complex Rehab systems and services and basic durable medical equipment (DME),** for example; the power wheelchairs that are advertised on daytime and late-night television; **are as different as night and day.**
- My skill level, experience and knowledge base required for providing appropriate Complex Rehab Technology products and services does not exist in the basic DME world.
- To assure individuals with significant mobility and postural impairments get what they require and that these products and services are supplied in an appropriate and cost-effective manner, Complex Rehab products and services must be treated differently than basic DME/DME.
- Complex Rehab must be assigned a separate benefit category under the Medicare program. To assure that only qualified suppliers provide these products and services, the complex rehab category must include its own more stringent supplier standards and qualifications, specific coverage policies, HCPCS code set and fee schedule.
- All legislative and regulatory decisions made on Capitol Hill and by CMS impact every person with disabilities who require these services, regardless of age or diagnoses.
- Medicaid and private insurers all eventually follow Medicare's lead. The decisions that seemingly affect only older Americans with disabilities have a profound influence on infants, children, teenagers and adults, regardless of their disability or health-care coverage.
- Americans with significant, complex postural and mobility impairments should have the equipment they need. I urge you to support a new benefit category under the Medicare program for Complex Rehab Equipment and services.
- **Ask for:**
    - **Co-sponsor legislation (when introduced) to support a new Benefit Category for Complex Rehab products and services under Medicare. Draft Legislative language and position paper are available**

Sample Text for an Invitation Letter for Site-Visit

TODAY'S DATE

THE HONORABLE *FIRST NAME LAST NAME*

U.S. House of Representatives or U.S. Senate or State House/Senate

Washington, DC 20515 *(for the House)* 20510 (*for the Senate*)

Capitol City, Your State Zip Code

Dear Senator or Congressman/woman ____*LAST NAME*_____:

I would like to invite you and your staff to visit *THE NAME OF YOUR ORGANIZATION*, where we provide Complex Rehab Technology products and services *OR* clinical seating and wheeled mobility services. Complex Rehab Technology includes wheelchairs and positioning equipment for people in our community with significant disabilities. The equipment and services we provide to the people we serve allows them to be more independent and more functional in the community. It allows these folks to live in their homes, not in institutions. Some go to school. Some go to work. Others do more for themselves then they could before.

Complex Rehab Technology systems and services and basic home medical equipment (HME), for example; the power wheelchairs that are advertised on daytime and late-night television, are as different as night and day.

Unfortunately access to this much-needed equipment is severely threatened by changes in Medicare and Medicaid legislation and regulation. We look forward to discussing these issues in greater detail when you visit our facility.

May we suggest that you visit us on *DATE* at *TIME*.

This will give you an opportunity to see our staff in action; get a better understanding of the equipment we provide and have a chance to meet with some of our clients who utilize this complex equipment. They are eager to talk with you about the importance of maintaining and improving access to these critical products and services.

We are also inviting therapists from the local seating clinic so you can discuss with them the impact this technology has on the lives of their patients. In addition, we plan to offer the opportunity for local press to attend as well.

Please visit our website, *WEBSITE ADDRESS*, for information about our company and the products and services we provide.

I will contact your office within the next week to follow-up on this invitation. Again, I hope you can join us on *DATE.*

Thank you in advance for considering our invitation.

Sincerely,

Your Name

Your Organization

Your Organization Mailing Address

Your Phone Number

Your Email Address

cc: NRRTS Fax 763 201 3345

Legislative Site Visit Contact Worksheet

Legislator's Name:
Name of Health LA:[7]
Name of Medicaid/Medicare LA:[8] [9]
Washington Office fax:
Washington Office phone:
Washing Office Scheduler's name:[10]
District Office phone:
District Office fax:
District Office Scheduler's name:
Senator's Name #1:
Name of Health LA:
Name of Medicaid/Medicare LA:
Washington Office fax:
Washington Office phone:
Washington Office Schedulers name:
In-State Office Phone:[11]
In-State Office Fax:
In-state Office Scheduler's name:
Senator's Name #2:
Name of Health LA:
Name of Medicaid/Medicare LA:
Washington Office fax number:
Washington Office phone:
Washington Office Scheduler's name:
In-State Office Phone:
In-State Office Fax:
In-State Office Scheduler's name:

[7] Click on Representative's or Senator's name, the click on "Staff " tab
[8] Legislative Assistant
[9] May or may not be the same as the Health LA
[10] Call ahead to get schedulers name to include in fax
[11] There may be a number of local offices. Choose one that is near you.