

ROLES AND RESPONSIBILITIES

*M*edicare Information Office



LOCAL HELP FOR PEOPLE WITH MEDICARE



Welcome to Alaska's Medicare Information Office

- We are the State Health Insurance Program (SHIP) and the Senior Medicare Patrol (SMP)
- Volunteers help with several major roles:
 - Provide one-on-one personalized counseling for people with Medicare
 - Conduct outreach to the public and media
 - Empower seniors to prevent healthcare fraud

Every state has a SHIP

- The State Health Insurance Program (SHIP) is the way that Medicare tries to meet the needs of beneficiaries in each state and US territories.
- SHIP is all about helping people get enrolled into the appropriate parts and pieces of Medicare, navigate their health insurance benefits and make the most of it for the least amount of money. This is our logo as Alaska's SHIP. People love our help!



Every state also has a Senior Medicare Patrol

- The Senior Medicare Patrol (SMP) is the federal government's way of stimulating each state to empower seniors to prevent Medicare fraud
- This effort is about explaining to people how to protect their identity from theft, review their Medicare paperwork to catch fraud.



How we're organized

- Both the SHIP and SMP are housed in the Medicare Information Office
- We try to be one-stop shopping for all things Medicare for beneficiaries, family, caregivers. We coordinate with many other agencies such as Long Term Care Ombudsman, Aging & Disability Resource Centers, Senior Benefit Program and Alaska 2-1-1.
- We're in the State **Department** of Health & Social Services
 - Senior and Disabilities Services (the **Division**)
 - Medicare Information Office is the name of the **Unit**

This is a grass-roots effort

We rely on trained volunteer counselors throughout the state to help seniors and people with disabilities in their communities understand how to get enrolled in the necessary Medicare plans, and to help them navigate when they have questions. We troubleshoot and assist people overwhelmed with decisions. It is very satisfying and thankFUL work.

How to Become a SHIP Volunteer Counselor

Here are the steps – not always 100% in this order!

<http://dhss.alaska.gov/dsds/Pages/medicare/volunteer.aspx>

Step 1 – Complete the volunteer application

Step 2 – Contact Nila Morgan, Volunteer Coordinator (907) 269-4199

Step 3 – Get familiar with Medicare via www.medicare.alaska.gov or www.medicare.gov

Step 4 – Complete the self-study modules online at your convenience

Step 5 – Take the Online Certification Tool to become “certified”

Step 6 – Get registered with SHIPTalk and get a Unique ID at <http://shipnpr.shiptalk.org/>

Step 7 - Sign the Memorandum of Agreement with HIPAA confidentiality policy

Step 8 – Get various other reference materials together in a Medicare Binder

Step 9 - Start taking counseling calls with the support/mentoring of a Certified Counselor

At any time through this process, the Medicare Information Office staff will be available for help!

Counseling and Media

- Counseling can include telephone calls, meeting with clients face-to-face, researching a topic or issue, contacting outside providers and insurance companies with the client's permission and assisting with reviewing Medicare Summary Notices.
- Outreach may involve health fairs or speaking engagements, or contacting your local radio or newspaper with authoritative information

Not all volunteers are counselors

- Some people help in the office, pack up our outreach materials, photocopy and staple booklets for outreach events. We have volunteers during the busy Open Enrollment Period for Prescription Drug Plans (October 15- December 7th) that meet and greet and direct “traffic.” They are volunteers and contribute their time and energy, but are not considered Medicare counselors. They do not have to complete training and certification.

Volunteer duties that are not counseling

- Enter data on clients we counsel (use a web-based system at our office or from your home computer)
- Organize outreach events/event planning and coordination
- Meet with clients who need help with their Medicare claims and help them place phone calls for clarification
- Assist with our Website www.medicare.alaska.gov by reviewing it regularly and proofreading, checking links and finding new resources and deleting outdated material
- Come into the office to help us with photocopying, stapling and packing for outreach events
- Make phone calls to verify names, addresses and emails of partner agencies
- Greet, act as receptionist and guide people during Part D Open Enrollment Clinics at the Anchorage Senior Center and/or Providence Hospital)
- Help with mailings such as to all the senior centers in Alaska

Some volunteers focus on fraud

- The Senior Medicare Patrol (SMP) grant focuses specifically on empowering seniors to reduce healthcare fraud.
- Some volunteers learn the basics of Medicare and then focus on
 - Giving informal seminars on how to spot fraud
 - Assist beneficiaries with possible errors, fraud or abuse in Alaska
- We call them SMP Volunteers and value them greatly for the specific contribution they make

SMP Volunteers

- SMP Volunteers are encouraged to learn as much as possible about Medicare to best help people protect their identities, detect and report fraud. SMP volunteers complete the SMP Volunteer Foundations Training
and
- pass the National SMP Volunteer Foundations Training Assessment (27 questions online).
- That constitutes being a Certified SMP Volunteer

Background Checks

- Because of the sensitive nature of health and financial information, background checks are required for all volunteers.
- Volunteer counselors working for other agencies or facilities funded by the State of Alaska may already have completed a background check.

Not all counselors are volunteers

The State funds grantees such as the Anchorage Senior Activities Center to staff a Medicare Information Counseling Site. The counselors there are not volunteers. There may be paid staff at various agencies who are volunteering to learn about Medicare to assist clients.

There are volunteer counselors at the Alzheimer's Resource Center, Senior Housing Complexes and many other agencies.

Qualities and Skills We look for in Medicare counselors

- Dependable, patient, and compassionate
- Are able to understand and explain complex issues
- Can protect client confidentiality (HIPAA)
- Can work during the workday
- Have easy access to the web and email
- Have had health insurance of their own
- enjoy solving problems

Counselor roles

- maintain confidentiality of client information including names, health information and Medicare numbers according to HIPAA
- assist seniors in understanding Medicare through answering questions and problem solving, individual counseling sessions and group outreach events
- **not** engage in private insurance counseling or financial planning assistance including application completion and distribution of information for profit
- arrange and speak to a group of seniors about Medicare fraud at least once a quarter
- refer suspected cases of error, fraud, abuse and waste to the Medicare Information Office
- assist the Medicare Information Office in sharing information through local senior center, community, tribal, health or other local agencies, the radio, TV, newspapers and other media
- enter client contact and public outreach events on the SHIPTalk data-entry system
- read emails and spread accurate, authoritative information about Medicare to the community
- participate in Medicare training opportunities and update teleconferences or webinars
- Join the Alaska Medicare Information Office listserv at <http://list.state.ak.us/soalists/medicare.information/jl.htm>

Medicare Information Office Staff Roles

- provide program management and leadership in reaching Alaska's SHIP and SMP goals
- provide resources (online, teleconference, CD and webinar-based training) to support volunteer counselors throughout Alaska
- provide assistance, supervision and mentoring to the counselor by phone, email or face-to-face
- provide counselors sample news releases and other media about Medicare
- assign counseling cases to local counselors as appropriate to their level of expertise
- assist in organizing outreach events, enrollment sites and public education seminars
- handle referrals from counselors to answer questions and assist with resolution of specific problems

Confidentiality

- Confidentiality is a priority for both the Volunteer Counselor and client. All information (medical, financial, personal) provided by the client is absolutely confidential and not to be shared with anyone except on an “as needed” basis with physician offices, insurance companies, or governmental agencies with the client’s permission.
- The Volunteer Counselor’s confidentiality is also a priority. Counselors do not give out names, addresses or phone numbers of Counselors to a client. The Counselor will be given the client’s contact information and will make the initial contact. The Medicare Information Office staff may follow up with the client to ensure that all their needs were met as it relates to the Medicare counseling issue they called about.
- Volunteer Counselor and client information is not to be distributed to any third party for any reason to protect everyone’s privacy.

Confidentiality Policy of the Medicare Information Office consistent with HIPAA

Please review this policy as it is on the Memorandum of Agreement that you will be asked to sign:

I, _____ serving as a SHIP and/or SMP volunteer for the State of Alaska, Dept of HSS, Senior & Disabilities Services, Medicare Information Office, have taken an oath of confidentiality and agree to the following:

In my position as a volunteer for the Medicare Information Office, I promise to protect the identity and confidentiality of any person I speak to or counsel. I will never disclose information about a client, family or provider without the written consent of the person involved. If information needs to be exchanged with Medicare Information Office staff it will be on a need-to-know basis and only include the facts and never involve gossip or hearsay. At no time will I discuss a client, family or healthcare provider in public or private conversations.

The Health Insurance Portability and Accountability Act's (HIPAA) "Minimum Necessary" portion of the Privacy Notice supports the above statements.

For our records, we always request your name printed clearly, the date, your email address and phone number. It helps us get in contact with you.

Memorandum of Agreement

- Be sure to complete the Memorandum of Agreement as a Medicare Counselor
http://dhss.alaska.gov/dsds/Documents/Medicare/volunteer_counselor_agreement.pdf
- Keep a copy and email, fax or send the Medicare Information Office a copy, too.

Expectations

- We expect all counselors to represent the Medicare Information Office in a professional manner
- A client contact or media form must be completed each time you participate in a counseling session or outreach event. All such encounters count as a SHIP activity and must be reported online by you or us
- We'll show you how to use SHIPTalk
 - Webinars
 - Call the Medicare Information Office at 1-800-478-6065
 - <http://dhss.alaska.gov/dsds/Pages/medicare/volunteer.aspx>

SHIPTalk – our reporting system

- All instances of counseling and outreach are documented with amount of counseling time, client's zip code, what topics you covered. This information goes to the federal government which monitors that funds are being used to help Medicare consumers in Alaska. **Not reporting data means reduced funding for our grant!**

SHIPTalk and Unique ID's

- You will get access to SHIPTalk so that you can easily enter the data on each client contact or media/public outreach event you have. (each entry takes about one minute).
- Certified counselors also get a fast “hotline” directly to Medicare Customer Service to avoid waiting with an 800#
 - We’ll show you how to get a “unique id” to access it

Volunteer Counselor Liability

- Medicare Counseling can lead to a financial consequence for the Medicare client or family member.
- Counselors may use the Client Agreement, Authorization and WAIVER form which explains the counselor's role and clarifies that they are not responsible for actions taken by the client. The waiver is on our website at <http://www.hss.state.ak.us/dsds/medicare/Volunteer.htm>

We are always learning

- It's vitally important to act in a professional manner when dealing with clients and make every effort possible to ensure the accuracy of the information you share. Even with training and experience, there are many times when you encounter something new and different. Staff in Anchorage sometimes need help from CMS staff in Seattle. We are always here for you. We are always learning new things.

Keeping up with Medicare News

We request that you subscribe to the Alaska Medicare Information Office which provides you with authoritative and current information on Medicare and how it works in Alaska. You can easily join or drop:

<http://list.state.ak.us/soalists/medicare.information/jl.htm>

Websites

- The national, official, authoritative and current website is www.medicare.gov
- We maintain the www.medicare.alaska.gov which is specific to Alaska.
- Please utilize both these sites to stay current.
- Do not believe everything you read from other sources, predictions, etc. Check the facts!

Volunteer Staff Dismissal

- The Medicare Information Office maintains the right to dismiss any member of the volunteer staff who does not participate according to agreements and responsibilities reviewed. Justifiable causes for dismissal include, but are not limited to:

Justifiable Causes for Dismissal

- A person counsels on a topic that they're not familiar with
- A counselor refuses to provide adequate or creates a discriminatory environment based on gender, race, nationality, color, age, disability, religion, creed or sexual orientation
- A counselor profits, in any way, from providing Medicare counseling services
- A counselor fails to respond to emails or voicemails suggesting that they have moved and they cannot be reached
- A counselor consistently provides inaccurate/outdated information to clients and such is reported to the Medicare Information Office.
- A counselor fails to maintain documentation of activities and file necessary reports in a timely manner.

- A warning will be discussed and provided in writing with a suggestion for corrective action. If the problem persists, the volunteer counselor may be dismissed.

Next steps

The next step is to dig into Medicare –

Go to www.medicare.gov for your own current Medicare & You Handbook

Go to www.medicare.alaska.gov and start working your way through the pages

If you find errors on our website, please contact jeanne.larson@alaska.gov

Medicare Information Office

Toll Free 1-800-478-6065

Judith Bendersky

Medicare Information Office Director

Desk: 907.269.3669

judith.bendersky@alaska.gov

Jeanné Larson

Lead Counselor and Trainer

Desk: 907.269.3649

jeanne.larson@alaska.gov

Nila Morgan

Volunteer Coordinator and Fraud Educator

Desk: 907.269.4199

nila.morgan@alaska.gov