Training

Statewide Health Insurance Benefits Advisors (SHIBA)

Getting ready for Open Enrollment

July 2017 volunteer training

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Handouts:

Authorization for release of information

Learning objectives

Volunteers will learn and be able to:

- Plan Open Enrollment activities and events with their local teams as appropriate
- Receive general information about agendas for fall Updates
- Explain what VRPM means and how it will improve SHIBA's work
- Identify how the updated performance measures from our funder (Administration for Community Living –ACL) are counted.
- Commit to collecting data to maximize reaching performance measures
- Support collecting client emails on CCRs, to get more feedback on client satisfaction
- Review the SHIBA confidentiality agreement
- Name what client information is considered protected "Personally Identifiable Information (PII)"
- Describe how we can share PII in secure and confidential ways
- Review how to find and use information on My SHIBA.

Planning for Open Enrollment and calendar sharing

Our updates in September and October will provide the latest on fall Open Enrollment, including:

- Timeline of Open Enrollment events
- Common Medicare Open Enrollment notices
- Rx Assistance programs
- LI-NET
- Plan Finder training - if needed
- And more!

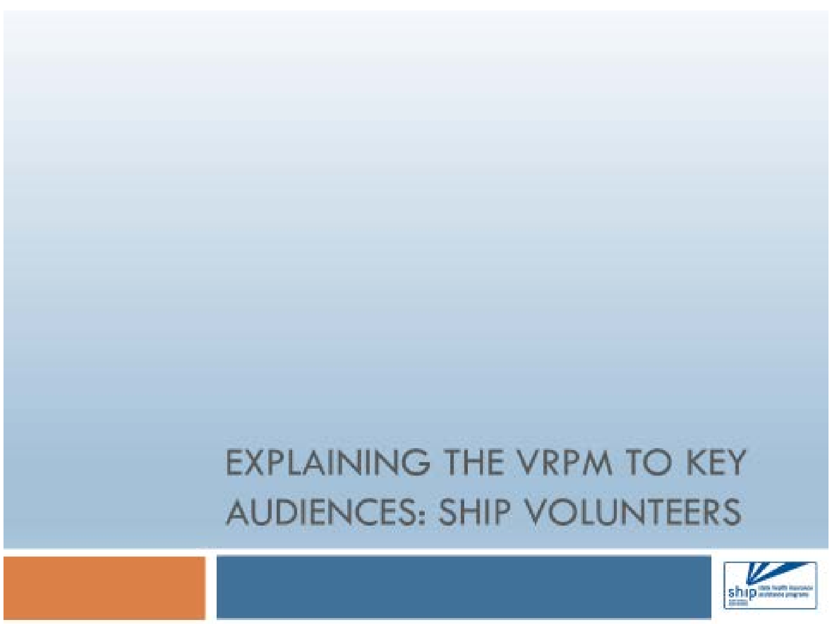
We do not plan to meet in August.

Today’s meeting is a chance for your group to get out your calendars if you haven’t already and get your local plans and timelines moving forward.

In June, 2017, we provided training updates to your volunteer coordinators about planning outreach events and getting Open Enrollment events on our statewide events calendar.

Your Regional Training Consultant (RTC) and volunteer coordinator will lead a discussion of about 10 – 15 minutes here if your group needs to plan. Otherwise, please move on to the next agenda item.

Explaining VRPM to SHIP volunteers



Your RTC will share this short presentation by PowerPoint. Please consult with him/her if you need handouts.

Performance Measures effective July 2017

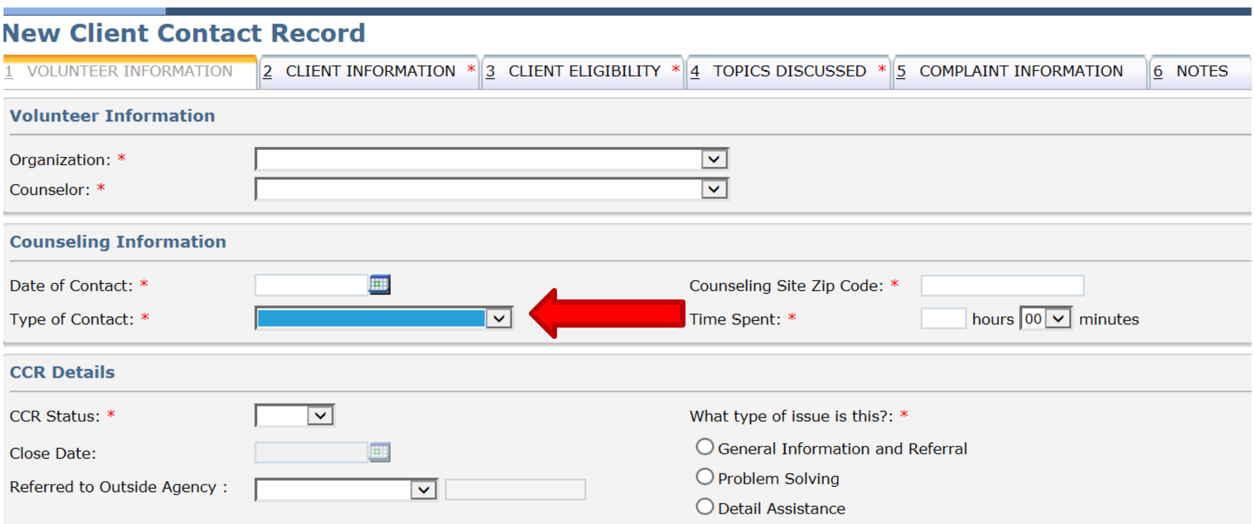
In past years, we had eight Performance Measures (PM). Effective this month (July 2017), we now have only five Performance Measures as directed by our funder, the Administration for Community Living (ACL). During last month's training, we discussed PM 4 (a): Low-Income beneficiaries. Below is a review of all five of the PMs.

Please remember when you choose "Not Collected" in these areas, you are making it impossible for our program to document the good work we do! If you don't enter it in the CCR, it's like it never happened! This has a direct impact on your local program funding and your ability to continue to provide the critical services that SHIBA and SMP deliver!

PM1: Client contacts – Percentage of total client contacts (in-person office, in-person home, telephone (all durations), and contacts by email, postal or fax) per Medicare beneficiaries in our state.

How is PM1 counted?

Total completed, closed Client Contact Record (CCR), including in-person, telephone, quick call, email/fax/postal mail.

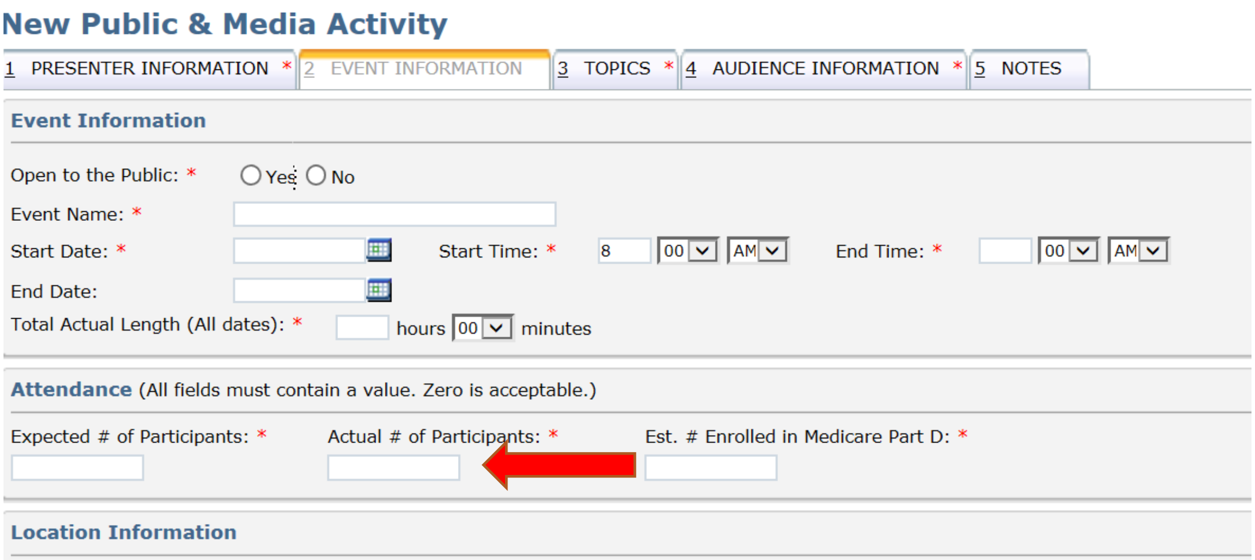


PM 1 includes:	**PM 1 does not include:**
Telephone (all durations), including Skype and other online call formats.	Unsuccessful attempts to reach a client (i.e. leaving a message)
In-person (office & home)	Individuals reached through public events (unless you have substantial individual contact with someone after the event)
Email	Contacts when the only purpose is to schedule an appointment
Postal mail	Mass mailings or mass emails
Fax (to individual clients)	

PM2: Outreach contacts – Percentage of people reached through presentations (including webinars and teleconferences), booths/exhibits at health/senior fairs, and enrollment events per Medicare beneficiaries in our state.

How is PM2 counted?

Completed Public & Media Activity (PMA)



New Public & Media Activity

1 PRESENTER INFORMATION * | 2 EVENT INFORMATION | 3 TOPICS * | 4 AUDIENCE INFORMATION * | 5 NOTES

Event Information

Open to the Public: * Yes No

Event Name: *

Start Date: * Start Time: * 8 00 AM End Time: * 00 AM

End Date:

Total Actual Length (All dates): * hours 00 minutes

Attendance (All fields must contain a value. Zero is acceptable.)

Expected # of Participants: * Actual # of Participants: * Est. # Enrolled in Medicare Part D: *

Location Information

The outreach event must:

- Include information for the public about Medicare and/or SHIP services.
- To count, you must:
    - o Count the attendance; **and**
    - o Allow time for Q&A at the time of the presentation.

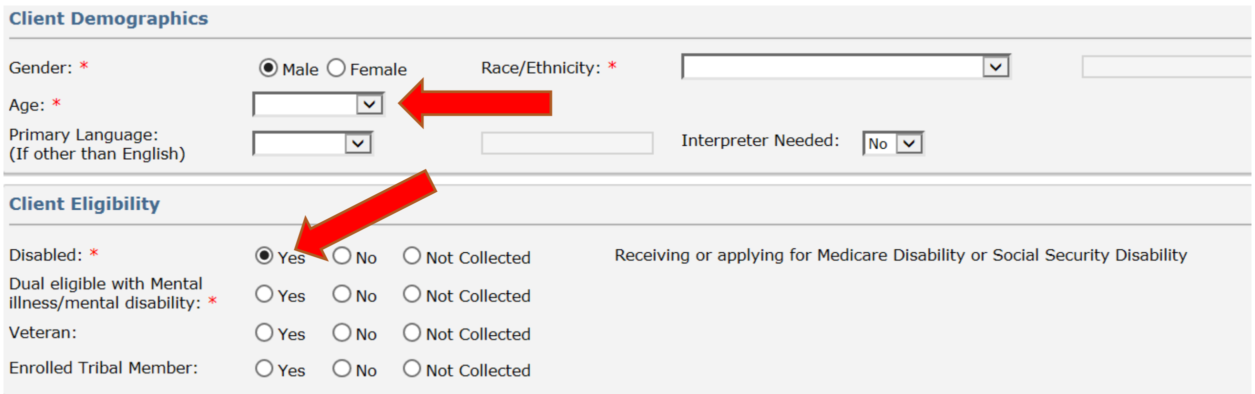
PM3: Medicare beneficiaries under 65 – Percentage of contacts with Medicare beneficiaries under the age of 65 per Medicare beneficiaries in our state.

How is PM3 counted?

Includes contacts with anyone who is under age 65 **and** receiving or applying for Medicare disability or Social Security disability. You must mark in two places:

1.) Age range must be under 65.

2.) The “Disabled” radio button must be marked “Yes.”



Client Demographics

Gender: * ◉ Male ○ Female Race/Ethnicity: *

Age: *

Primary Language: (If other than English) Interpreter Needed: No

Client Eligibility

Disabled: * ◉ Yes ○ No ○ Not Collected Receiving or applying for Medicare Disability or Social Security Disability

Dual eligible with Mental illness/mental disability: * ○ Yes ○ No ○ Not Collected

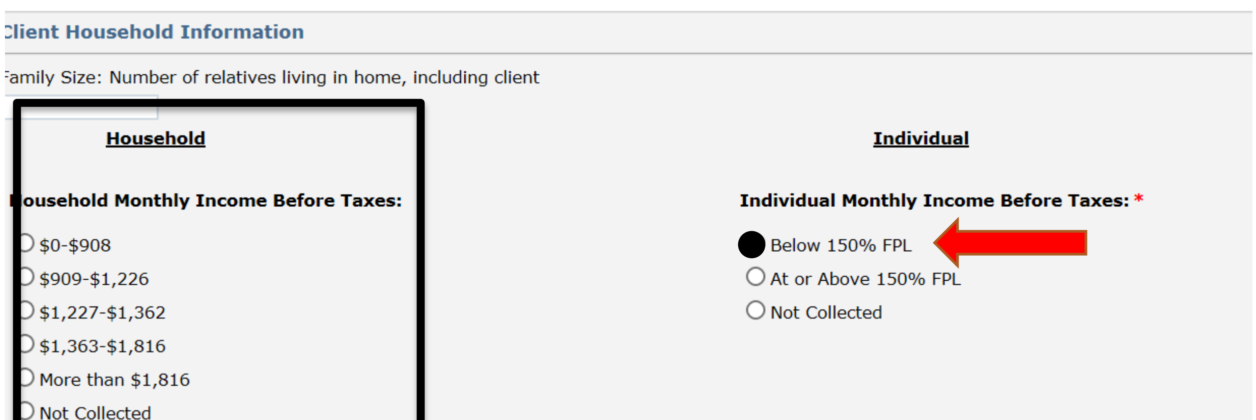
Veteran: ○ Yes ○ No ○ Not Collected

Enrolled Tribal Member: ○ Yes ○ No ○ Not Collected

PM4: Hard-to-reach contacts – Percentage of **A)** low-income, **B)** rural and **C)** non-native English contacts per total "hard-to-reach" Medicare beneficiaries in our state.

How is PM4 counted?

A) Low Income: Below 150% FPL (Note: Please mark in the Individual Monthly Income side, regardless of family size and use the Rainbow Chart to determine if income based upon family size is below 150%.) Marking Household Monthly Income does not count.



Client Household Information

Family Size: Number of relatives living in home, including client

Household

Household Monthly Income Before Taxes:

○ $0-$908
○ $909-$1,226
○ $1,227-$1,362
○ $1,363-$1,816
○ More than $1,816
○ Not Collected

Individual

Individual Monthly Income Before Taxes: *

● Below 150% FPL
○ At or Above 150% FPL
○ Not Collected

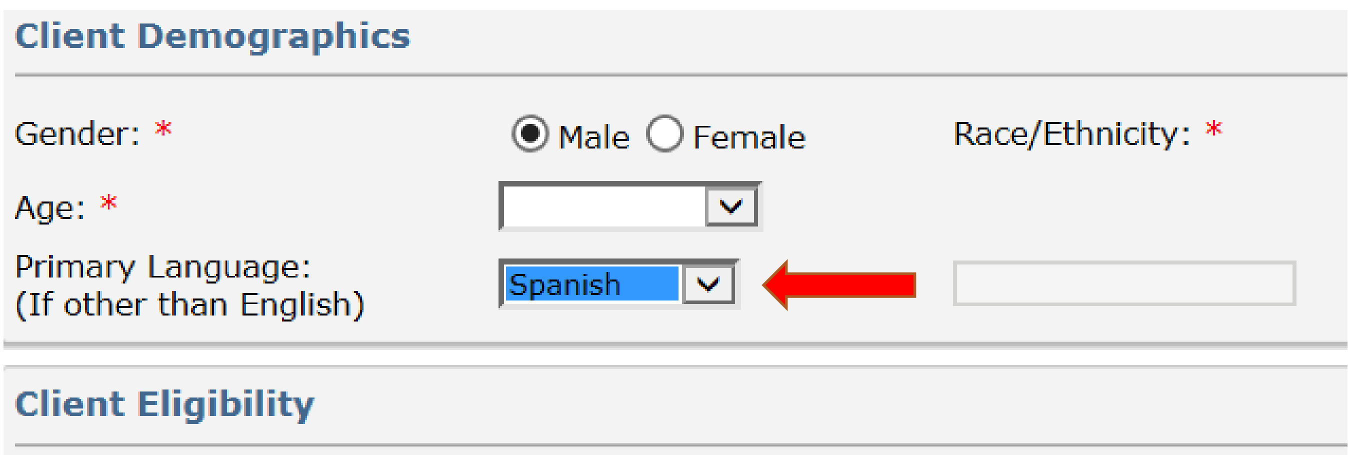
Does not count 1

B) Rural: This is determined by the zip code the client lives in. Certain zip codes are considered rural by the Federal Office of Management and Budget. It's important to enter the client's actual zip code in the CCR.

C) Non-Native English: A client should be considered non-native English speaker if:

a. They would answer "no" to the question "Is English your native language?" **OR**
b. The counselor can reasonably conclude that the client is not fluent in understanding, speaking, reading, and/or writing the English language, and may need an interpreter.

To show this on the CCR: In the client demographics section, you must select "Primary Language other than English." Use this, even if the client now communicates in English. (Example: Spanish is used here only for illustration purposes, you can choose other languages, and there is an option for "Other" if the language is not on the list.)



PM5: Enrollment contacts – Percentage of unduplicated enrollment contacts (i.e., contacts with one or more qualifying enrollment topics) discussed per Medicare beneficiaries in our state.

How is PM5 counted?

In the "Medicare Topics Discussed" tab on the CCR, you must mark one or more topics that you discussed with the word "Enrollment" in it. Explaining how to enroll counts, as well as assisting people to enroll.

Topics Discussed * **Mark ALL topics that apply.** (At least one topic from Medicare or Non Medicare Topics must be selected.)

Medicare Topics Discussed: Age 65 and older or Medicare related:

◉ Yes ○ No

Medicare Dollars Saved:

☐ Yearly Estimated Dollars Saved $

Medicare (Parts A and B)

- ☐ Appeals / Complaints
- ☐ Claims / Billing
- ☐ Enrollment / Eligibility / Benefits

Prescription Drug - Medicare Rx (Part D)

- ☐ Appeals / Complaints
- ☐ Claims / Billing
- ☐ Enrollment / Application Assistance
- ☐ Low Income Assistance (LIS)
- ☐ Plan Eligibility
- ☐ WA State Rx Discount Card

Medicare Health Plans / Advantage (Part C)

- ☐ Appeals / Complaints
- ☐ Claims / Billing
- ☐ Enrollment / Eligibility / Comparisons
- ☐ Plan / Benefit Changes / Non-renewals

Medigap / Supplements

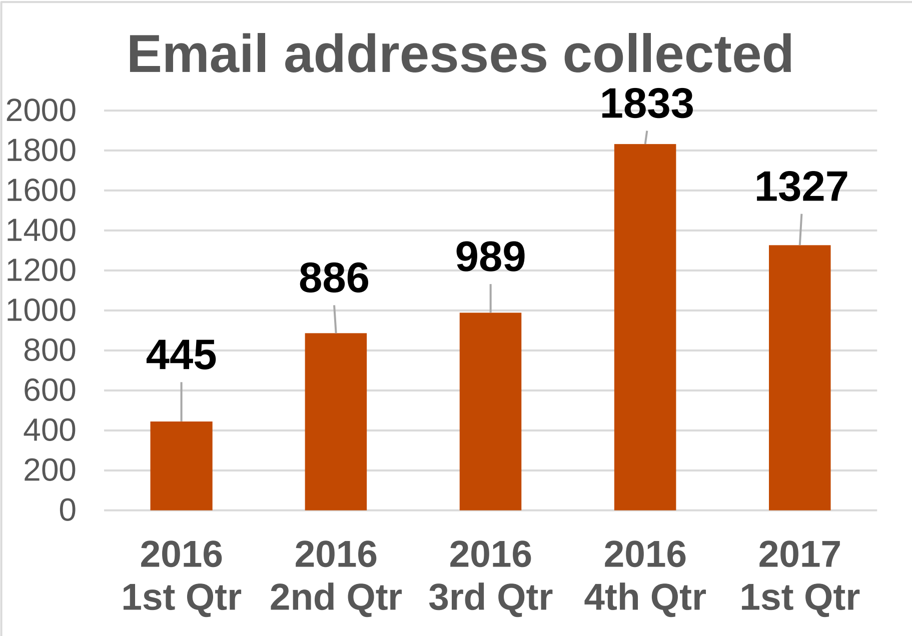
- ☐ Appeals / Complaints
- ☐ Changing Coverage
- ☐ Claims / Billing
- ☐ Enrollment / Eligibility / Comparisons

If the same client contact has more than one enrollment topic selected, the contact will only count once.

Client satisfaction surveys and email addresses

SHIBA is working to collect satisfaction surveys by email from our clients to get information about how we can do a better job. Feedback is compiled quarterly and shared with the sponsors.

Below is a chart that shows the number of emails we collected by quarter since we started counting. We see that SHIBA is collecting more emails. In the first quarter of 2017, we collected 882 more emails than we did in the first quarter of 2016!



Please keep up the good work and continue to give every client the chance to provide an email address solely for the purpose of providing feedback on the services they get from SHIBA.

Here's how you can ask for the address:

"In order to provide feedback to the Office of Insurance Commissioner on the services you received today, could you please provide an email address? We will only use it for the survey."

Personally Identifiable Information and protecting client confidentiality

SHIBA volunteer advisors have access to a lot of personal information about our clients. Many of them are very vulnerable due to their age and health. That is why we interview prospective volunteers, run background checks and have them sign agreements that include a pledge to keep confidentiality.

All SHIBA volunteers sign an agreement that includes the following wording:

> ***CONFIDENTIALITY***
> *I will not disclose any identifying client personal information to anyone outside the SHIBA organization without the client's authorization in accordance with state and federal law.*

What is Personal Information? (Sometimes called Personally Identifiable Information or PII). Any information about an individual that can be used to distinguish or identify that individual is PII. Examples include:

- Social Security Numbers
- Name
- Address
- Date of birth
- Phone number
- Financial information
- Credit card numbers
- Medical records
- List of prescriptions
- Health conditions
- Income or assets
- Sexual orientation
- Political party affiliations

What are the possible consequences of inappropriately sharing PII?

- Identity theft
- Financial exploitation or theft
- Loss of trust
- Personal bankruptcy
- Humiliation
- Termination from SHIBA

What if you need to share or discuss WITHIN the SHIBA organization?
For example, you want to get advice from your volunteer coordinator, RTC or mentor; or need to submit a complaint to the SHIBA complaints coordinator.

Okay to share	Not okay to share
In person, in a place where others can't overhear	In person, if others can overhear
By telephone, if others can't overhear	By telephone, if others can overhear
Entering information into SHIBA Online is secure	Paper CCRs should be kept in secure, locked place until entered into SHIBA Online, then shredded.
An email with only the CCR number is secure	ANY personal information in the body of an email is not secure, unless the email is encrypted
Sending documents by Fax or by US Mail	Sending documents as attachments via email are not secure, unless the email is encrypted

What if the client asks for your help and you have to share or discuss OUTSIDE of the SHIBA organization?
Call Medicare, doctor's offices, insurance companies with the client on the phone, so he/she can give the information and permission for you to assist.

Have the client sign an "Authorization for Release of Information."

- Follow all tips in the Okay/Not Okay chart

My SHIBA: What's in it for me?

Did you know you can find a lot of useful stuff on My SHIBA? And, it will be the latest version! Today, your RTC will give you a quick tour and highlight some places that SHIBA volunteers may find very helpful.

IMPORTANT NOTE: On June 1, the OIC launched a new Internet (www.insurance.wa.gov) Web content management system. The implementation of this new system required URLs (web addresses) on the OIC website (www.insurance.wa.gov) including the "SHIBA volunteers only" or as you know it "My SHIBA" section to change. Please be sure to update ANY bookmarks (favorites) that you might have saved in your favorites.

How to get to My SHIBA:

1. Go to the Insurance Commissioner website: www.insurance.wa.gov
   a. Scroll all the way to the bottom of the page
   b. Click on "SHIBA Volunteers only"
   c. You will see a place to log into My SHIBA
   d. Enter this password in the space: Document1234
   e. Click login box
2. The system sees your "cookie" (a small amount of data about you the website generates that your web browser saves) and so the next time you go to login into My SHIBA, it may just skip the login screen and take you directly to the My SHIBA webpage. This is okay. However, if you ever clean out your cookies, the system will then prompt you to enter the password in the login screen.

Tip: You can save the My SHIBA homepage in your favorites to bookmark it.

My SHIBA

SHIBA Online

- SHIBA Online database
- SHIBA Online reporting forms
- SHIBA Online practice site

Volunteer training

- SHIBA training toolbox
- Basic training

Publications

- Order SHIBA publications
- SHIBA publications
- Order Medicare Savings Program brochure (www.hca.wa.gov)
- Order Medicaid-related publications (www.hca.wa.gov)
- Other agencies' foreign language publications
- CMS's product ordering website (www.productordering.cms.hhs.gov)

Medicare Open Enrollment tools

- Counseling Medicare clients - OEP related
- Medicare outreach and advertising

Outreach

- Public presentations
- Outreach tools and materials
- Public information template and style guide (PDF, 340KB)
- Sample SHIBA ads
- SHIBA web-based event calendar form
- SHIBA advertising request form
- SHIBA speaker request form

Forms

- SHIBA Online reporting forms
- Travel reimbursement
- New volunteer application packet (PDF, 369KB)
- Senior Medicare Patrol group session post survey forms
- Medicare Savings Program application (Word, 184KB)

Resources

- CenturyLink Worldcard
- SHIBA logos
- SHIBA agenda template (Word, 63KB)
- SHIBA volunteer handbook (PDF, 447KB)
- SHIBA sponsor operations manual (PDF, 2.3MB)
- SHIBA customer survey results (PDF, 431KB)
- SHIBA profile (PDF, 120KB)

News and events

- News Flash
- SHIBA outreach event calendar
- Medicare & Medicaid at 50 video (kff.org)

Contact information

- SHIBA sponsor directory (PDF, 135KB)
- SHIBA staff directory (PDF, 135KB)
- SHIBA regional trainer map (PDF, 294KB)

We encourage you to become familiar with all of the information in My SHIBA. Four areas in My SHIBA that we will focus on with you today:

1. **Volunteer training section**

   a. **SHIBA training toolbox**
      i. SHIBA monthly in-person training
         Links to the materials we hand out to you at monthly trainings

      ii. Volunteer-only resource materials
         Includes materials such as QRCs (we don't give these to clients), and are sorted by counseling topic. Each document has a small picture of it to help you identify it. Example: Rainbow Chart.

   b. **Basic training**
      i. Links to Online Basic training, mentoring checklist and path to certification information

2. **Publications section**

   a. **Order SHIBA publications**
      Offers instructions on how to order publications the OIC produces to give to our clients or use for outreach.

   b. **SHIBA publications**
      Provides a list with links, sorted by topic area, of the publications we can use to give to clients. Each document has a small picture of it to help you identify it. Example: Current list of approved Medicare Supplement (Medigap) plans.

3. Medicare Open Enrollment tools section

a. Counseling Medicare clients – OEP related

This section contains SHIBA counseling resources and materials related to Open Enrollment. Keep your eyes on this space as we get into the fall and prepare for Open Enrollment 2017.

4. News and events section

a. SHIBA outreach events calendar

We want all of our sponsors to use this for Open Enrollment events, special events and even regular counseling sites throughout the year. Even if beneficiaries aren't using the calendar much, staff in Tumwater are, and more and more people are becoming used to finding this information online. It's one more tool to help our clients find SHIBA services.

Give us your feedback

We're open to feedback about how we can make My SHIBA more useful to you. Please give feedback on the Training Course Evaluation form today, or contact Donna Wells, SHIBA communications coordinator at donnaw@oic.wa.gov or at 360-725-7238.

Scenarios/Quiz

1. What does VRPM stand for?
   a. Volunteer Related Plan Marketing
   b. Very Rigorous Personnel Monitoring
   c. Volunteer Risk & Program Management
   d. Virtual Reality Property Marketing

2. When are the VRPM standards due to be completed?
   a. October 15, 2017
   b. December 7, 2017
   c. January 1, 2018
   d. April 1, 2018

3. Who can you ask if you have questions about VRPM?
   a. Liz Mercer
   b. Your volunteer coordinator
   c. Your RTC
   d. Any of these are correct

4. You meet with a client about her Medicare options. She speaks English quite well, but she does have an accent. She tells you she's originally from Germany and she moved to the United States 35 years ago with her husband who she met when he was stationed there with the US Army. How can you document that she is a non-native English speaker?

5. You call a client to schedule an appointment for him to come to your local SHIBA office to meet with a SHIBA advisor. Do you create a CCR for this phone call?

6. You call a client to schedule an appointment for her to come to your local SHIBA office to meet with a SHIBA advisor. While setting the appointment, you answer her questions about how to contact Social Security to enroll in Medicare and give her an overview of the time frame she has to enroll. Do you create a CCR for this phone call?

7. A client comes in to your office with a pile of medical bills, EOBs and letters from her Medicare plan. She sent in a complaint to the SHIBA office in Tumwater last week and she wants you to help her get these papers to the SHIBA complaints coordinator. Which are secure ways to send this information?
   a. Put them in the US Mail
   b. Scan them and attach them to a regular email
   c. Scan them and attach them to an encrypted email
   d. Fax them to the SHIBA office in Tumwater

8. You want to ask your RTC and your volunteer coordinator a question about a client you are working with. You will try to call, and you'll leave a voice mail if you can't reach them, and you think you'll also send an email. Which are secure ways for you to give details about the client you are asking about?
   a. Send an email with the CCR number. Put the details in the CCR, including the notes field.
   b. Leave a voice mail with the CCR number. Put the details in the CCR, including the notes field.
   c. Send an email with details and your questions in the body of the email.
   d. Send an encrypted email with details and your questions in the body of the email.

9. You're looking for the most current online version of the OIC's Approved Medicare Supplement (Medigap) plans for your client. Where are some places you can you find it?
   a. In the SHIBA office where you work
   b. In the Publications section of the My SHIBA site
   c. On the www.Medicare.gov website
   d. On the www.insurance.wa.gov website

Training Course Evaluation

Date of Training: ______________________________

Training Location: ______________________________

How can SHIBA improve the monthly trainings?

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____

____

What additional trainings within our SHIBA scope would you like to see?

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What SHIBA training materials (including QRCs) would you like to see added to My SHIBA?

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____

____

Other:____

____

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If you prefer to give electronic feedback about curriculum please contact:
Liz Mercer: lizm@oic.wa.gov or Judith Bendersky: judithb@oic.wa.gov