



Equity & Person-centered counseling

Materials

- This PowerPoint presentation.
- Link to video presentation.
- Participant workbook.
- STARS BCF supplement: *sample* completed.
- STARS data, from OIC.

Housekeeping

There will be specific question times.

- Mute yourself.
- Raise your hand.
- Limit your questions to the material we are covering.

Equity & Person-centered counseling

Key Terms

Equity

Is an approach that prioritizes services, support, and resources tailored to the individual needs, preferences, and circumstances, ensuring each person has an opportunity to thrive on their own terms.

Person-centered counseling

Is a way to support people that puts them at the very heart of decisions that affect their life.

It emphasizes quality of life, well-being, and informed choice.

Learning outcomes

1. Identify one change you can make so data collection is more effective and inclusive.
2. Share an idea for how the SHIBA team and Sponsors can help support the volunteer advisors better.

Things to Consider

- What did you hear?
- How did you feel?
- What does this message mean to you?
- How might you change your own practice?

Message from Program Manager

- Video [presentation](#)

Discussion

- What did you hear?
- How did you feel?
- What does this message mean to you?
- How might you change your own practice?

Key Ideas

- These have always been our core values
- We are accountable – the ‘burden of proof’ is on us
- We’re committed to learning together and from each other
- Doing this well help to ensure our long-term success

Scenario: presentation

Caller: Hi. I just moved here from Southern California. I need to change plans because I had an MA-PD plan that is not available here. I'm open to a Medicare Supplement plan, but MA-PD is easy and affordable for me. Right now, getting some mental health support is important to me. I'm grieving the loss of my partner.

Counselor: --

Scenario: case work

What is on our list?

	Case Fact	Ask	Tell	Share
Item				
Item				
Item				
Item				

Sample Counseling Session

Recording

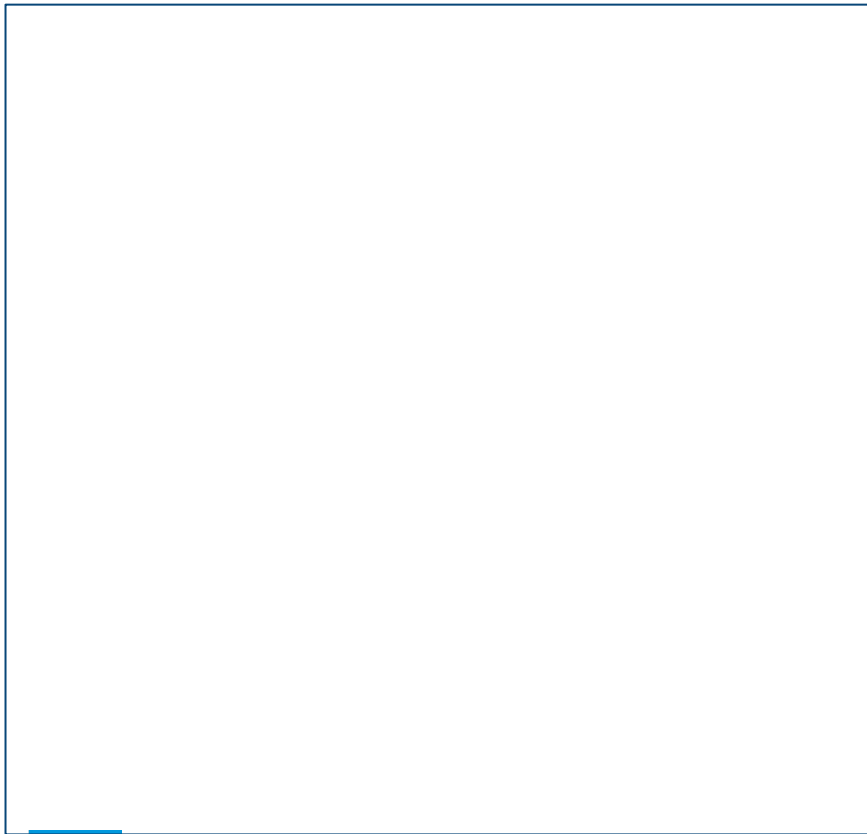
Coaching

What did they do well?

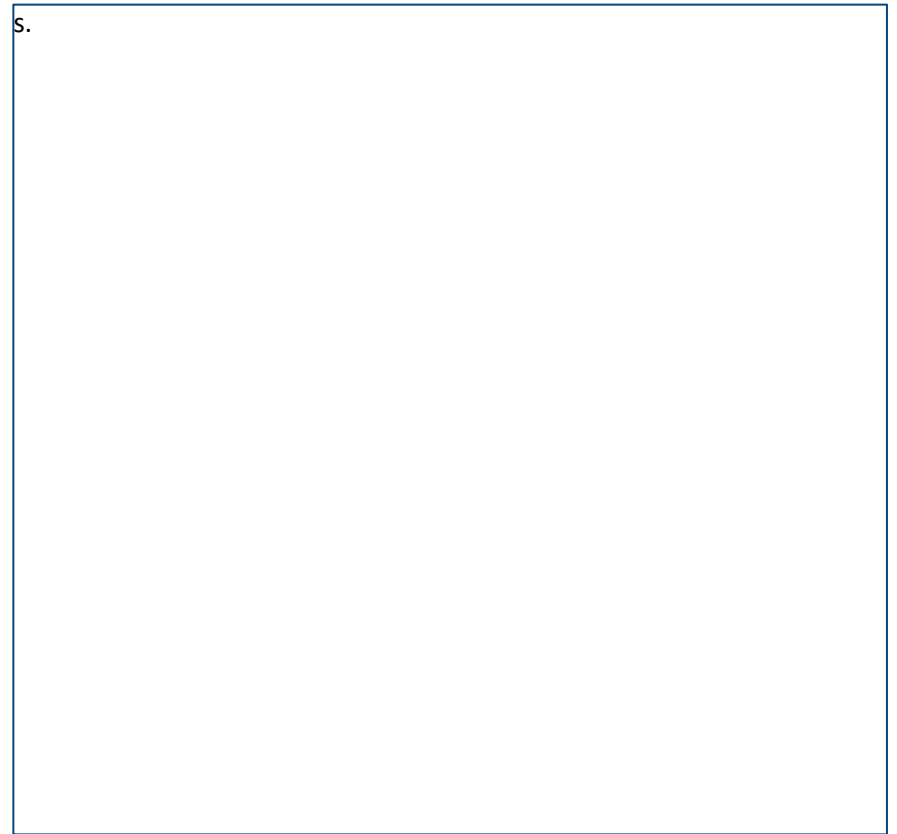
What can they do better next time?

Let's compare approaches

Person-centered
Client-focused



System-centered
Rules-focused



How would you ask?

- Beneficiary income, assets?

Activity: SHIBA STARS Beneficiary Contact Form

How did Beneficiary Learn About SHIP* (select only one):			
<input type="checkbox"/> CMS Outreach	<input type="checkbox"/> Partner Agency	<input type="checkbox"/> State SHIP Website	<input type="checkbox"/> Other
<input type="checkbox"/> Congressional Office	<input type="checkbox"/> Previous Contact	<input type="checkbox"/> SHIP TA Center	<input type="checkbox"/> Not Collected
<input type="checkbox"/> Employer	<input type="checkbox"/> SHIP Mailings	<input type="checkbox"/> SSA	
<input type="checkbox"/> Friend or Relative	<input type="checkbox"/> SHIP Media	<input type="checkbox"/> State Medicaid Agency	
<input type="checkbox"/> Health/Drug Plan	<input type="checkbox"/> SHIP Presentation	<input type="checkbox"/> 1-800-Medicare	
Method of Contact* (select only one):		Beneficiary Age Group* (select only one):	Beneficiary Gender* (select only one):
<input type="checkbox"/> Phone Call	<input type="checkbox"/> US Mail or Fax	<input type="checkbox"/> 64 or less	<input type="checkbox"/> 85 +
<input type="checkbox"/> Email	<input type="checkbox"/> Face to Face at Site/Event Site	<input type="checkbox"/> 65 – 74	<input type="checkbox"/> Not Collected
<input type="checkbox"/> Web-based		<input type="checkbox"/> 75 – 84	<input type="checkbox"/> Collected
Beneficiary Race* (multiple selections allowed):		Beneficiary Language*:	
<input type="checkbox"/> American Indian/Alaska Native	<input type="checkbox"/> Native Hawaiian/Other Pacific Islander	English is Beneficiary's Primary Language <input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/> Asian		Receiving or Applying for Social Security Disability or Medicare Disability* (select only one):	
<input type="checkbox"/> Black or African American	<input type="checkbox"/> White	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/> Hispanic or Latino	<input type="checkbox"/> Other		
	<input type="checkbox"/> Not Collected		
Have you or a family member ever served in the military?			
<input type="checkbox"/> Yes		<input type="checkbox"/> No <input type="checkbox"/> Unsure	
Beneficiary Monthly Income* (select only one):		Beneficiary Assets* (select only one):	
<input type="checkbox"/> Below 150% FPL	<input type="checkbox"/> Not Collected	<input type="checkbox"/> Below LIS Asset Limits	<input type="checkbox"/> Not Collected
<input type="checkbox"/> At or Above 150% FPL		<input type="checkbox"/> Above LIS Asset Limits	

Scenario: data entry

Completed BCF

Your BCF might look different than this one – that's OK.

STARS data entry

“No judgment” zone

What does “not collected” mean?

STARS data, sample

Report from STARS

Announcements and resources

Upcoming data collection changes

ACL Demographic Data Collection

- Current variables include age range, race, income, assets, English primary
- March 9, 24 incorporating sexual orientation and gender identity to SIRS/STARS

Which of the following best represents how you think of yourself? [Select ONE]:

- Lesbian or gay
- Straight, that is, not gay or lesbian
- Bisexual
- I use a different term [free text]
- Don't know
- Prefer not to answer

What is your current gender [Select ONE]

- Female
- Male
- Transgender
- I use a different term: [free text]
- Don't know
- Prefer not to answer

Do you consider yourself to be transgender?

- Yes
- No
- Prefer not to answer

15

Glossary

Equity

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Resources

SHIBA Beneficiary Contact Form (BCF)

<https://www.insurance.wa.gov/sites/default/files/documents/stars-bcf-paper-form.pdf>

SHIP Person-Centered Toolkit:

<https://portal.shiptacenter.org/Portal/Resource/Resource-Detail.aspx?ResourceGUID=0a7b457d-28f4-425c-a4d7-f3964177b5c>

CMS & SHIP

Registration Link to Building Skills and Confidence in Demographic Data Collection webinar February 6th, 2024:

https://nei3a-org-centers.zoom.us/webinar/register/WN_7Rkh52pISV-ngxyl0ph2SQ#/registration

Learning outcomes

1. Identify one change you can make so data collection is more effective and inclusive.

2. Share an idea for how the SHIBA team and Sponsors can help support the volunteer advisors better.

Poll

Was this training worth your time?

5. Absolutely
4. Yes
3. Somewhat
2. Not really
1. Not at All