

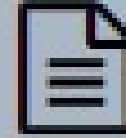
# **Tools to Provide Counseling Remotely (During COVID-19)**

May 15, 2020

# Closed Captioning for This Event



Live Captions



Transcript

## Live Captions

- Provides closed captioning starting from the moment you click the link provided in WebEx Chat.

## Transcript

- Provides the full transcript from the start of the call until the time you click the “Transcript” tab. You can save the transcript for yourself if you’d like a copy.

Save transcript:



# Welcome!

## SMPs

- Senior Medicare Patrol

## SHIPs

- State Health Insurance Assistance Program

## MIPPAs

- Medicare Improvements for Patients and Providers Act



# Panelists: ACL and SMP/SHIP/MIPPA



**Marissa  
Whitehouse**

SMP Program  
Manager,  
Administration for  
Community Living



**Candace  
Young**

Volunteer  
Coordinator,  
Hawaii SHIP



**Susan  
Spilly**

State Special  
Populations  
Coordinator,  
Indiana  
SHIP/MIPPA



**Renee  
Labrie-  
Shanks**

Montana SMP  
Program  
Manager,  
Missoula Aging  
Services

# Panelists: The Centers



**Sue Choplin**

**SHIP Technical Assistance  
Center**



**Ann Kayrish**

**NCOA's Center for Benefits  
Access**



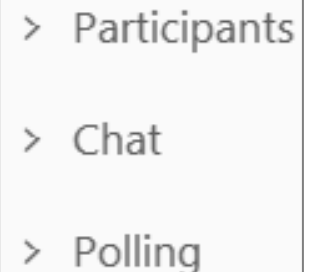
**Heather Flory**

**SMP Resource Center**

# Poll: What do you/your team find to be the most difficult about counseling Medicare beneficiaries remotely? (Select all that apply.)

- Using technology
- Amount of time vs. in-person counseling
- Ability to measure the beneficiary's understanding vs. in-person counseling
- Dealing with documentation: completing applications, collecting signatures, reviewing MSNs & EOBs, etc.
- None of the above – we're not doing any counseling until we can safely meet in person.
- None of the above – we've got it all figured out!

**When the polling has ended, click the arrow to re-open the Participants panel.**



> Participants  
> Chat  
> Polling

# Agenda

**ACL  
Updates**

**Panelist  
Presentations**

**COVID-19  
Resources**

**Q&A**

# ACL Update

- **Planned outreach activities and meetings**

- CDC recommends reviewing your planned events, programs, and services to determine if you need to temporarily postpone or cancel anything.
- ACL encourages you to consult your state health departments and local published guidance to make these decisions.
- SMP/SHIP National Conference will shift to fully virtual format.

- **Potential program impact**

- ACL anticipates contact numbers to decrease in the public health emergency. Communicate openly with your ACL Project Officer about any impacts you are experiencing. This knowledge will inform explanations cited in public facing reports like the OIG Report and the SHIP Report to Congress.
- ACL has extended SHIP/MIPPA reporting deadlines and will continue to monitor further program reporting deadlines as need for extension is identified.

- **ACL will continue to share information via listservs and [acl.gov/COVID-19](https://acl.gov/COVID-19).**





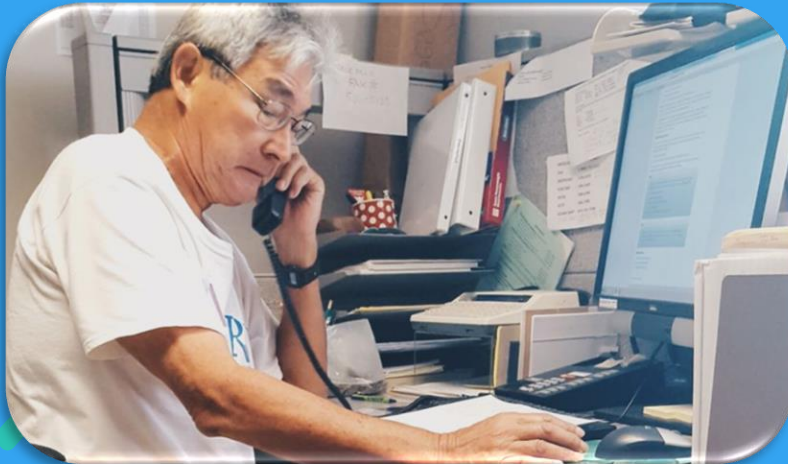
## Hawaii State Health Insurance Assistance Program

Providing free, local, unbiased, one-on-one help to beneficiaries during COVID-19

Presented by Candace Young,  
Volunteer Coordinator, Hawaii SHIP

# Service Excellence

- Call Retrieval and (Re)Assignment Process
- Cell Phone Distribution
- BCF Protocol
- Supporting Counselors Remotely



# Call Retrieval and (Re)Assignment Process

## **Purpose:**

- Log, track, and assign calls to counselors while protecting beneficiary's information

## **Procedure:**

- Calls from the Hawaii SHIP Helpline are retrieved hourly, logged, and tracked
- Within 24 hours, assigned to a counselor of the day via a password protected email
- Clients who could not be reached are reassigned to the next counselor

# Call Retrieval and (Re)Assignment Process, cont'd

## Assignments include the following:

- Beneficiary's name
- The date the beneficiary contacted Hawaii SHIP
- Beneficiary's telephone number or email address
- Beneficiary's zip code (assigned to counselor on island)
- Brief description of the inquiry and help requested

# Distributing Cellphones to Counselors (9/2018)

## Purpose:

- To increase the success rate of reaching clients who would not accept blocked calls
- To avoid long distance charges when counseling clients on the neighbor islands
- Clients returned calls to the SHIP phone which protect the volunteer's personal phone info

# Distributing Cellphones to Counselors, cont'd

## **Provision, support, and maintenance:**

- Order, inventory, and deliver free phones to counselor, upon request
- Providing technical support to volunteers to learn the features and how to care for the phone
- Monitor battery life and order free replacements as needed

## **Distribution procedures:**

- Serial number
- Phone number
- Name of the counselor
- Date of distribution
- Signature of the counselor

# BCF (Beneficiary Contact Form) Protocol

## Goal:

- To ensure counselors are completing and submitting Beneficiary Contact Forms for grant reporting purposes

## Options:

- Counselors input their own BCFs into STARS
- Counselors snail mail hard-copy BCFs to administrative support or staff to upload into STARS

MIPPA Contact	Yes / No radio buttons
Session Conducted By	Dropdown menu
Zip Code of Session Location	
State of Session Location	Dropdown menu (Field defaults to "Hawaii")
County of Session Location	Auto-populates when zip code is entered
<b>REQUIRED FIELDS (continued)</b>	<b>Field Features (continued)</b>
State of Beneficiary Residence	Dropdown menu (Field defaults to "Hawaii")
Zip Code of Beneficiary Residence	
County of Beneficiary Residence	Dropdown menu
Date of Contact	Calendar icon (mm/dd/yyyy)
How Did Beneficiary Learn About SHIP	Dropdown menu
Method of Contact	Dropdown menu
Beneficiary Age Group	Dropdown menu
Beneficiary Gender	Dropdown menu
Beneficiary Race	<input type="checkbox"/> Check boxes and list of races
English as a Primary Language	Yes / No radio buttons
Beneficiary Monthly Income	Dropdown menu
Beneficiary Assets	Dropdown menu
Receiving or Applying for Social Security Disability or Medicare Disability	Yes / No radio buttons
Topics Discussed <b>At least one Topic Discussed selection is required. Please choose a Topic before continuing.</b>	
Original Medicare (Parts A & B)	<input type="checkbox"/> Check boxes and list of sub-topics
Medigap and Medicare Select	<input type="checkbox"/> Check boxes and list of sub-topics

BCF = Beneficiary Contact Form

# BCF (Beneficiary Contact Form) Protocol, cont'd

## Resources:

- Counselors needing assistance: Staff created step-by-step procedures on inputting BCFs (located in the Hawaii SHIP volunteer handbook)
- Counselors mailing hard copies: Staff provided counselors with prepaid envelopes and gave them options to mail the forms to volunteers who solely upload STARS forms OR mail them to the SHIP office to be forwarded to staff for upload

MIPPA Contact	Yes / No radio buttons
Session Conducted By	Dropdown menu
Zip Code of Session Location	
State of Session Location	Dropdown menu (Field defaults to "Hawaii")
County of Session Location	Auto-populates when zip code is entered
<b>REQUIRED FIELDS (continued)</b>	<b>Field Features (continued)</b>
State of Beneficiary Residence	Dropdown menu (Field defaults to "Hawaii")
Zip Code of Beneficiary Residence	
County of Beneficiary Residence	Dropdown menu
Date of Contact	Calendar icon (mm/dd/yyyy)
How Did Beneficiary Learn About SHIP	Dropdown menu
Method of Contact	Dropdown menu
Beneficiary Age Group	Dropdown menu
Beneficiary Gender	Dropdown menu
Beneficiary Race	<input type="checkbox"/> Check boxes and list of races
English as a Primary Language	Yes / No radio buttons
Beneficiary Monthly Income	Dropdown menu
Beneficiary Assets	Dropdown menu
Receiving or Applying for Social Security Disability or Medicare Disability	Yes / No radio buttons
Topics Discussed	
At least one Topic Discussed selection is required. Please choose a Topic before continuing.	
Original Medicare (Parts A & B)	<input type="checkbox"/> Check boxes and list of sub-topics
Medigap and Medicare Select	<input type="checkbox"/> Check boxes and list of sub-topics

GOEF = Group Outreach and Education Form



# Supporting Counselors Remotely



## Goal:

- To supply Hawaii SHIP counselors with the tools and information needed to effectively counsel clients during the COVID-19 pandemic

## Actions Taken:

- Emailing national updates to counselors and volunteers
- Creating specialized PowerPoints and infographics on information needed to assist clients
- Providing webinar opportunities to counselors and volunteers
- Supporting counselors by answering questions about clients' cases
- Thanking counselors for their dedication to assisting clients

**MEDICARE COVERAGE & CORONAVIRUS** 



- Medicare Part B covers COVID-19 testing, when your doctor or other health care provider orders it (after February 4, 2020). You are not required to pay the Part B deductible or any coinsurance for this test, because clinical diagnostic laboratory tests are covered under traditional Medicare at no cost sharing.
- Medicare covers all medically necessary hospitalizations. CMS is waiving the requirement for a 3-day prior hospitalization for coverage of a skilled nursing facility (SNF) stay if needed due to COVID-19.
- There's no vaccine for COVID-19. However, if one becomes available, it will be covered by all Medicare Prescription Drug Plans (Part D)
- Medicare pays for virtual check-ins, brief, virtual services with your physician or certain practitioners where the communication isn't related to a medical visit (You pay your usual Medicare coinsurance and deductible for these services)
- If you live in a rural area, you may use communication technology to have full visits with your doctors. Medicare pays for many medical visits through this telehealth benefit

**Hawaii SHIP Helpline: 808-586-7299**

This project was supported, in part by grant number 90SAPG0005, from the U.S. Administration for Community Living, Department of Health and Human Services. Grantees undertaking projects under government sponsorship are encouraged to express freely their findings and conclusions. Points of view or opinions do not, therefore, necessarily represent official Administration for Community Living policy.

**Mahalo from  
Hawaii SHIP**



# Tools, Technology, and Tips from Indiana SHIP/MIPPA

Susan Spilly, State Special Populations Coordinator

## Indiana Department of Insurance



LOCAL HELP FOR PEOPLE WITH MEDICARE

**Need Help** with  
**Medicare** Costs?

# Client centered solutions

- Medicare Savings Program application challenges
  - USPS is our partner
  - Signatures & envelopes
  - New snag with Medicaid expansion transitions
- Extra Help/LIS-fewer problems so far
- Conference calls and mentoring
- Plan finder search assistance
- Group “counseling”
  - New to Medicare, COVID and Medicare, COVID Scams, MSP/LIS
- Iphone Skillz
- Wi-fi Issues and hot spot solutions

# What We Do Best

- Live answer calls during business hours
  - “Call backs” and “Pass throughs” for volunteers, staff and contractors
- Connect with callers over the phone- more time needed
  - Slow calm voice, multiple check-ins for understanding  
“I can’t see if your eyes are glazing over”
- Check for familiarity with Medicare
- Validate confusion
- Find related topics-establish rapport

# What We Do Best ... continued

- Check in by asking-*"How are you doing with all this?"*
  - Scam information
  - Documentation- Special Use Field
- Simultaneously walk through Plan Finder
- Hand written notes with mailed materials
- Follow up calls
- Volunteer recruitment



***“I think it’s possible to turn this lemon of a situation into lemonade. While face-to-face counseling is best, counseling by phone allows me to spend more time with each client. I can call clients back when I know I have plenty of time for them-I don’t have to rush to another appointment. I feel that my clients leave with a much better understanding of their Medicare because I get to spend extra time with them.”***

***Melissa Miller, Volunteer Supervisor  
East Central Indiana***



EST. 1982

**MISSOULA** *aging* **SERVICES**

WE'RE PROUD *of* OUR YEARS

**Presented by Renee Labrie-Shanks,  
Montana SMP Program Manager, Missoula Aging Services**

**337 Stephens Avenue, Missoula, MT 59801 406.728.7682**

**info@missoulaagingservices.org | missoulaagingservices.org**





## Mission



We promote the  
independence, dignity and health  
of older adults  
and those who care for them.

MISSOULA *aging* SERVICES

# Montana SMP



- Contracts with AAAs across state
- Local SMP in each coverage area, managed from Missoula
- Long time use of web and remote communications via partners prior to COVID-19

# SMP Services Include



- Consults
- Virtual classes and content
- New Facebook videos
- Dissemination activities

# SMP during COVID-19: Clients



- Call Center for immediate assistance
- Every SHIP call shares SMP information
- Consultations-taking longer / utilizing mail and email more / doing more 3-way calls / Dropbox / Zoom
- Adobe Acrobat Pro XI with password protection: pros & cons
- 1-800-Medicare using CMS Unique ID

# Facebook Videos



- Recorded and placed on Youtube
- Content includes approved materials shared via SMP
- Script is typed Word doc with type down center of page
- Use laptop camera as I read script

# Questions?



**RENEE LABRIE-  
SHANKS**

*Montana SMP Program Manager*

**T 406.728.0581 F 406.728.7687**

**337 Stephens Ave. Missoula, MT 59801**

**MISSOULAAGINGSERVICES.ORG**

MISSOULA *aging* SERVICES



# **Resources from the SHIP, SMP, and MIPPA Centers**

# COVID-19 Medicare Coverage Q&A Tip Sheet

Available in the SHIP  
and SMP Resource  
Libraries and on  
NCOA's website:

[www.ncoa.org/wp-content/uploads/COVID-19 Medicare-Coverage Q A sheet-4-22-20.pdf](http://www.ncoa.org/wp-content/uploads/COVID-19%20Medicare-Coverage%20Q%20A%20sheet-4-22-20.pdf)



## COVID-19 Medicare Coverage



LOCAL HELP FOR PEOPLE WITH MEDICARE

### Medicare Beneficiary Questions & Answers

Scams related to the coronavirus, also known as COVID-19, are rapidly increasing as the public health emergency develops. Scammers are targeting older adults and those with serious long-term health conditions who appear to have a higher risk for serious illness from COVID-19. Fraudsters are attempting to bill Medicare for sham tests or treatments related to the coronavirus and are targeting individuals to illegally obtain money or Medicare numbers.

The Senior Medicare Patrol (SMP) program wants Medicare beneficiaries to have the most up-to-date information on what Medicare covers and when. This document provides answers to the most commonly asked questions regarding Medicare's coverage related to COVID-19.

**Q. What should Medicare beneficiaries do about non-COVID-related procedures (e.g., scheduled surgery) during this time?**

**A.** As more health care providers are increasingly being asked to assist with the COVID-19 response, it is critical that they consider whether elective or nonurgent surgeries and procedures can be delayed so they can use limited personal protective equipment (PPE), beds, and ventilators to care for COVID-19 patients. These recommendations from the Centers for Medicare & Medicaid Services (CMS) outline factors that should be considered for postponing elective surgeries and nonessential medical, surgical, and dental procedures: <https://www.cms.gov/files/document/31820-cms-adult-elective-surgery-and-procedures-recommendations.pdf>

**Q. I need to go to the doctor but I don't want to go to the office. What should I do?**

**A.** You may be able to communicate with your doctors or certain other practitioners without necessarily going to the doctor's office in person for a full visit. Medicare pays for "virtual check-ins" – brief, virtual services with your physician or certain practitioners where the communication isn't related to a medical visit within the previous seven days and doesn't lead to a medical visit within the next 24 hours (or soonest appointment available).

**Q. What is the advice around receiving Medicare home health care services during the COVID-19 pandemic?**

**A.** Home health agencies can continue to provide services to beneficiaries. This will allow patients to be cared for in the best environment for them while supporting infection control and reducing impact on acute care and long-term care (LTC) facilities. Home health agencies can also utilize telehealth to perform initial assessments and determine patients' homebound status remotely or by record review. If necessary, the home health nurse, during an otherwise covered visit, could also obtain a sample to send to the laboratory for COVID-19 diagnostic testing.



# Counselor Fact Sheet: Medicare Coverage and Coronavirus

Available in the  
SHIP and SMP  
Resource Libraries  
and on NCOA's  
website:

[http://www.ncoa.org/ncoa\\_acf/covid-19-resources-for-professionals/](http://www.ncoa.org/ncoa_acf/covid-19-resources-for-professionals/)

## Medicare Coverage and Coronavirus

As the number of cases of COVID-19 (also known as coronavirus) increases, so does the importance of counselors in helping beneficiaries understand what services are covered.



### Covered services include:

#### Coronavirus testing

Coronavirus testing is covered under Medicare Part B as a clinical laboratory test. A beneficiary's doctor can bill Medicare for this test beginning April 1, 2020 for testing provided after February 4, 2020. A beneficiary will owe nothing for the laboratory test and associated provider visits (no deductible, coinsurance, or copayment). This applies to both Original Medicare and Medicare Advantage Plans.

#### Coronavirus vaccine

There is currently no vaccine for coronavirus. If a coronavirus vaccine is developed, it will be covered by Medicare Part B. Beneficiaries will owe no cost-sharing (deductible, coinsurance, or copayment).

#### Inpatient hospital care

Inpatient hospital care is covered under Medicare Part A, and standard coverage rules and cost-sharing apply. Medicare typically covers a semi-private room, but it should cover a private room when it is medically necessary. For example, if a beneficiary needs a private room in order to be quarantined, they should not be asked to pay an additional cost for the private room. If a beneficiary has a Medicare Advantage Plan, they should contact their plan to learn about its costs and coverage rules.

#### Outpatient hospital care

Outpatient hospital care is covered under Part B, and standard coverage rules and cost-sharing apply. If a beneficiary receives observation services at a hospital, they are considered an outpatient—even if they have a room or stay overnight. Whether a beneficiary is an inpatient or outpatient is important because, depending on their situation, a beneficiary may need an inpatient stay before Medicare will cover skilled nursing facility (SNF) care, but this rule has been relaxed somewhat during the COVID-19 emergency (see next page).

SHIP National Technical Assistance Center: 877-839-2675 | [www.shiptacenter.org](http://www.shiptacenter.org) | [info@shiptacenter.org](mailto:info@shiptacenter.org)

This document was supported, in part, by grant number 90SATC0001 from the Administration for Community Living (ACL), Department of Health and Human Services, Washington, D.C. 20201. [April 2020]

# Successful Practices: Telework & Outreach During the COVID-19 Pandemic Tip Sheet

Available in the SHIP  
and SMP Resource  
Libraries and on  
NCOA's website:

<https://www.ncoa.org/wp-content/uploads/COVID-Successful-Practices.pdf>



In March 2020, the Administration for Community Living (ACL) emailed a survey to SHIP, MIPPA, and SMP networks that asked about program needs and success stories related to the COVID-19 pandemic. In addition, the networks hosted two webinars on COVID-19 in April and collected successful practice feedback from discussion on the network's listservs and with the resource centers. Below are some successful practices gleaned from the conversations and survey results. Here are links to a sampling of responses grouped by the following topics: [counseling](#), [media](#), [training](#), and [volunteer management](#).

## Workplace Tips

Before addressing outreach efforts, you must first decide how your SMP will operate during this pandemic. Notify your state representatives, partners, volunteers, and community that you are open for remote services.

## Working at Home

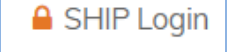
- Update your website, Facebook page, and voicemails to reflect your new operating practices and hours.
- Have contact information for your organization posted on the doors.
- Those who can work from home should make sure they have a phone, computer, and internet access.
- Do an evaluation of volunteers' situations, attitudes, skills, and equipment.
- Toll-free calls:
  - Implement an automatic phone routing system for your toll-free number.
  - Have the phone forwarded to one person or several staff members.
  - Use Google Voice, Comcast, MightyCall, LogMeIn, Grasshopper, or another Voice over Internet Protocol (VoIP) system to place calls without needing to use your personal phone number.
- Discontinue the use of faxes for referrals since the fax is usually at the office. Use an encrypted email system or document sharing service like Dropbox or WeTransfer.
- Address and train on confidentiality issues surrounding storing and securing personal identifying information while working from home.
- Have team members do recertification and training during this time to keep them involved. This can be through webinar recordings, online training in TRAX, or printed versions of the manuals.
- Use texting to advise callers that a return call will be coming soon.

## Working at the Office

- If available, those who prefer to work at the office should have a private office, practice social distancing, and close the door.
- The office should be closed, however, to in-person visitors.

# Privacy and Confidentiality Online Course: Training for SMPs & SHIPs

## SHIPs

- Step 1: Login at  [www.shiptacenter.org](http://www.shiptacenter.org) (click the orange SHIP Login padlock).
- Step 2: Click the green button - Training and Certification (OCCT)

Training And Certification (OCCT)

- Step 3: Click the Courses menu and scroll to “Special Topics.”

## SMPs

- Step 1: Login at [www.smpresource.org](http://www.smpresource.org)
- Step 2: Click the TRAX tab, then click “Available Training.”
  - **SMP Counselors:** Use the Online Course tab to take the Privacy and Confidentiality Online Course.
  - **SMP Complex Interactions Specialists** with a CMS Unique ID: Use the Curriculum tab to take the CMS Unique ID Training Curriculum.

**Questions about which training to take or how to take your training? Contact your supervisor.**

# NCOA/MIPPA Center COVID-19 Resources (publicly available)

<https://www.ncoa.org/>

COVID-19  
RESOURCE CENTER

OLDER ADULTS  
& CAREGIVERS



PROFESSIONALS



## Key Resources about COVID-19:

[www.ncoa.org/covid-19/covid-19-resources-for-professionals-1/key-government-resources-for-professionals/](https://www.ncoa.org/covid-19/covid-19-resources-for-professionals-1/key-government-resources-for-professionals/)



### Key Resources for Professionals

Find key resources and tools developed by NCOA's national partners in aging and disability and the federal government.

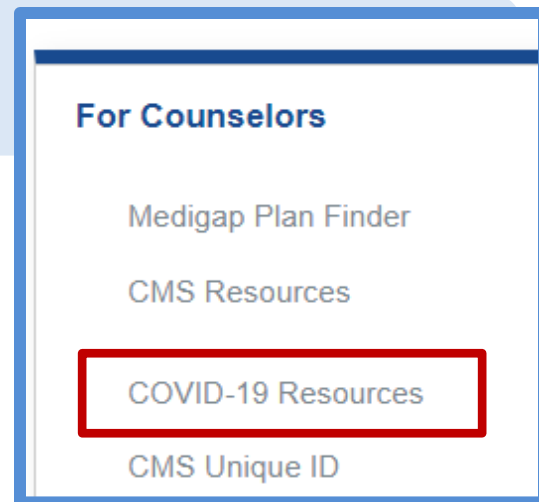
Explore



# SHIP TA Center COVID-19 Resources

[www.shiptacenter.org](http://www.shiptacenter.org) > SHIP Login

- COVID-19 in Toolbox > For Counselors
- COVID-19 Events
- COVID-19 News (from ACL, CMS, etc.)
- Resource Library:
  - COVID-19 Fact Sheets and Facebook images
  - COVID-19 resources from other SHIPs
- **Tip:** Use “Type for Search” – keyword “Covid”





# SMP Resource Center COVID-19 Resources

## Publicly available

- COVID-19 Fraud page (includes a Spanish-language fraud alert):  
<https://www.smpresource.org/Content/Medicare-Fraud/Fraud-Schemes/COVID-19-Fraud.aspx>

## Password-protected resources for SMPs:

[www.smpresource.org](http://www.smpresource.org) > SMP Login

- COVID-19 web events
- SMP Consumer Fraud Alert: COVID-19 Fraud Resources (includes several Spanish-language resources)
- SMP Resource Center Infographics – COVID-19
- **Tip:** Search for keyword “COVID”.


# Additional Public Resources from the Centers

- Center for Benefits Access/MIPPA resource center  
<https://www.ncoa.org/centerforbenefits/>
  - Outreach toolkit Guides to Facebook advertising, earned media, telephone town halls, radio PSA
  - Promising practice clearing house
  - Resource library
- SMP Resource Center website: [www.smpresource.org](http://www.smpresource.org)
  - Medicare fraud, news, what SMPs do, how you can help, and more
- SHIP TA Center website: [www.shiptacenter.org](http://www.shiptacenter.org)
  - Home page (News, Blog); Medicare, Success Stories, and Volunteer menus


# Webinar Resources in the Libraries

10

## SMPs

- Step 1: Login at [www.smpresource.org](http://www.smpresource.org) (click the blue SMP Login padlock). 
- Step 2: Search for keyword “COVID”.

## SHIPs

- Step 1: Login at [www.shiptacenter.org](http://www.shiptacenter.org) (click the orange SHIP Login padlock). 
- Step 2: Go to the Resource Library.
- Step 3: Search for keyword “COVID”.

**MIPPAs:** Resources will be emailed to the MIPPA listserv.



# Questions and Sharing

**Thank you for participating in today's webinar!**  
**This presentation is now available for download.**



**If you have questions or want to share strategies for providing counseling during COVID-19, raise your hand.**

**If you have questions later...**  
**Counselors, please contact your supervisor!**  
**SMPs, email: [info@smpresource.org](mailto:info@smpresource.org)**  
**SHIPs, email: [info@shiptacenter.org](mailto:info@shiptacenter.org)**  
**MIPPAs, email: [centerforbenefits@ncoa.org](mailto:centerforbenefits@ncoa.org)**

*This webinar was supported, in part, by grant numbers 90SATC0001 and 90MPRC0001, from the U.S. Administration for Community Living, Department of Health and Human Services, Washington, D.C. 20201.*