



2021 SMP/SHIP National Conference
Virtual Meeting • Part One–April 27-29, 2021

Covid Silver Lining:

**New Tools For Managing Volunteers
in a Pandemic and Beyond**

Kathleen Gouveia and Caroline Louise Cole

April 27, 2021

Massachusetts SHINE Program

Serving the **H**ealth **I**nsurance **N**eeds of **E**veryone

Kathleen Gouveia
April 27, 2021

Massachusetts SHINE by the numbers

- 4.0 FTE at state level
- 13 regional programs, 2-3 staff, 30-60 counselors
- 1 state-wide Greater Boston Chinese Golden Age Center
- 700 +/- volunteer and paid staff counselors covering community-based organizations, multi-service and senior centers, independent living, hospitals, housing, cancer clinics
- Independent sector states that volunteer hours in MA are worth \$34/hour
- 88 bilingual counselors
- In CY 2020 almost 62,000 client contacts
- Group Outreach and Education Events- 225 statewide; total of 576 hours
 - Estimated # of attendees 10,706
- Media Outreach and Education Events- 564 statewide; total of 861 hours
 - Estimated # of attendees 3,095,267
- 15 cable television shows including the Young at Heart show in Dracut, MA

Prior SHINE Counselor Training

- New counselor training -January-April 100+/-, 40 hours of face-to-face training, group work and mentoring to provide personalized health benefits counseling
- Training includes Medicare, supplements, prescription drug coverage options, billing, Medicaid, medicare.gov, duals plans, cultural competency, fraud and abuse, STARS data base; Certification exam
- Recertification training April-June for all veteran counselors- review, privacy training, LGBTQ training, Volunteer Risk Program Management training, data collection and analysis to improve program performance and Recertification

2020 Training Changes

- All in person training paused, suddenly became virtual
- Some counselors took a leave of absence (60% of counselors > 65 years old)
- Some acquired new roles- Meals on Wheels, food banks
- Conducted a survey in early spring 2020
 - Surveys returned revealed a need for immediate new counselor training with computer competency, increased broadband etc.
- Training on technology needed (Zoom, privacy, sharing screen) and posted on counselor web site
- Over 100 new counselors trained by 9/15
- Mentoring via Zoom or Phone

Counseling Session

- By phone, Skype, Zoom or e-mail with mail/drop off component
- Counseling demand lower from some, but digital competency led to creation of short educational videos for consumers and counselors
- Process established to retrieve call or email, forward Medicare Beginner's Guide or info by email or mail, then counselor make call or email
- Privacy concerns, blocked phone numbers led to use of agency emails, Google Voice, more training and work arounds

Counselor Website

- Before COVID-19
 - SHINE has a counselor website where counselors can gain access to documents, charts and any updates needed
- During COVID-19
 - Creation of new sections of the website:
 - Remote Counseling Tools
 - COVID-19 Resources
 - Counselor Appreciation Page

Tools that were created for remote counseling

- Remote counseling tip sheet
- When to password protect (or encrypt) a document
- How to password protect (or encrypt) a document
- Open enrollment checklist
- Pre-appointment Form
- Counseling by phone tools:
 - *67 process (blocking phone number)
 - Google Voice
 - How to sign up for Google Voice Account
 - How to make a phone call with a Google Voice Account
- Counseling by video process:
 - Zoom Tutorials
 - How to create a Zoom account
 - How to share documents on Zoom
 - The basics of Zoom
- Some of the not common, but we provided resources to: Webex ad Ring Central

Page 8

When to Password Protect a document (encrypt)



Important things to remember when sending documents to Medicare Beneficiaries electronically

1. Always remember PII and PHI when sending documents.

PII and PHI

| Personally Identifiable Information (PII) | Protected Health Information (PHI) |
|---|--|
| Information which can be used to distinguish or trace an individual's identity , such as their name, social security number, biometric records, etc. alone or when combined with other personal or identifying information which is linked or linkable to a specific individual, such as a data and place of birth, mother's maiden name, etc." ¹ | Individually identifiable health information that is explicitly linked to a particular individual, and health information which can allow individual identification. ² PHI includes many common identifiers (e.g., name, address, birth date, Social Security Number) when they can be associated with the health information listed above. |

2. Documents need to be password protected if they contain:
 - A client's name
 - Address
 - Birth date
 - Medicare number
 - Social Security number
3. Information that does not need to be password protected:
 - Plan comparisons
 - Plan enrollment confirmation
 - Brochures on the program, fraud prevention, or identity theft

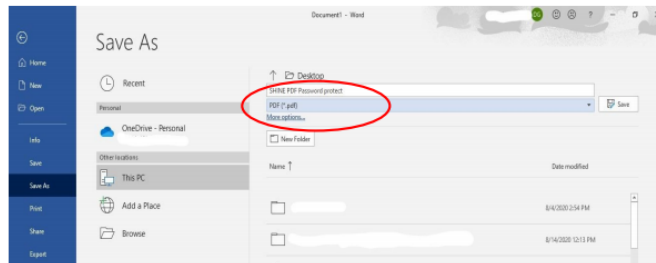
Dated Created: 9/19/2020

1

How to password protect (or encrypt) a document



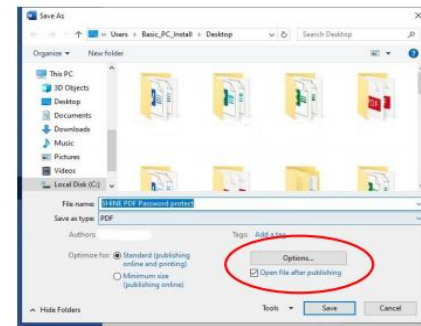
Step One: Open the document that you wish to password protect. Save the document as a PDF (drop down under the name of the document). Before saving click on “More Options”.



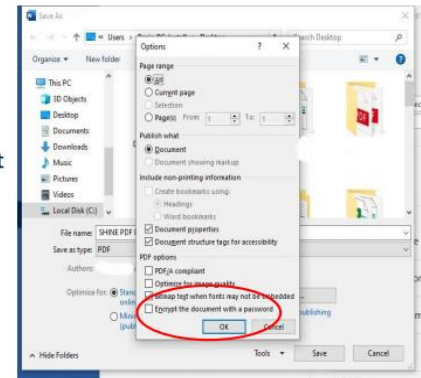
Date Created: 8/26/2020

1

Step Two: Click on “Options” on this screen.



Step Three: This screen will pop up next. Here is where you will check off “Encrypt the document with a password”. Next click “OK”.



Date Created: 8/26/2020

2

Medicare Beginners Guide Created

- Medicare Beginners Guide is a brief overview of the parts of Medicare, enrollment periods, penalties, Medicare Plan Finder and how to create an account, Massachusetts Medigap Chart and Massachusetts Medicare Advantage Chart
- Medicare Beginners Guide was created and then distributed to consumers before counseling sessions (email, mail, etc.)



Medicare Beginner's Guide



Massachusetts SHINE Program

Updated March 2021

Counselor Appreciation

COUNSELOR APPRECIATION PAGE

TO ALL OF OUR INCREDIBLE SHINE COUNSELORS:



Once again, it's time to celebrate our amazing counselors during Volunteer/Counselor Appreciation Month. We know this has been an incredibly difficult year for everyone, with so much loss happening all around us. The way our counselors stepped up to the plate and showed such flexibility in learning new ways to counsel, ensuring that no beneficiary would be left behind is an inspiration. Our counselors are the heart and soul of our program. Here's to you and all you have accomplished this year!



Counselor Kudos

Dear Ms. Kinder,
 We received your package of information on prescriptions drug plans. We are most grateful for all your help and time. We are looking them over and picking them out. With much appreciation,
 Wanda Charles

Elizabeth
 Thank you so much for taking the time to help me with my medicine

Nov. 28, 2020
 Dear Elizabeth,
 Thank you so much helping me pick the proper Part D Prescription policy. I really appreciated your kindness.

Dear Elizabeth,
 Thank you for your help through SHINE. Stay safe and enjoy th Holidays. Sincerely

Dear Ms. Johnson:
 I spent approximately forty minutes on the phone with me helping to navigate and supports my effort to apply to those health fragile Senior program on behalf of my wife. Her name is Tracy.
 On August 29th we received a letter accepting my wife into their program. The importance of this acceptance is two fold: 1) more accessible by the importance of this acceptance health care for her and 2) a savings of about \$200.00/month (a significant amount that we are both retired).
 I had been working on this application for about one year. Asking for more information and then re-billing multiple times when certain my wife's application would not have occurred. Your office is fortunate to be represented by such a person as Tracy.

Hi Kaye,

Just wanted to thank you for your Medicare 101 presentation today. For presentation, you guys did an awesome job and were very informative. I know the information covered was extensive, covering a lot of information in a short amount of time. I thought all three of you touched the main points of how the system works in a concise and fairly easy to understand manner. You have my email address and I certainly would welcome the opportunity to complete a survey, of course with high marks.

Furthermore, I appreciate the amount of time you had spent with me to insure I would be hooked up to the presentation. I also want to thank you for emailing the file on the power point presentation of Medicare 101 and the information on creating a Medicare Account. I know this is the new way to reach people or at least during our current times and you all did it in an informative and professional manner.

Again, thanks for all your help,

RGJ

Collaborating with Resources

- Worked with the Massachusetts SCSEP (Senior Community Service Employment Program)
 - To employ and assist with phone satisfaction surveys and Beneficiary Contact Form data entry
- Great success with the virtual environment
- Trained the SCSEP trainees in privacy training, phone surveys, when to escalate issues to Regional Directors, how to quality check the BCFs and enter into the STARS system

Spreading the Word about Health and Drug Insurance Flexibilities

- Communication with Regional Directors, counselors, partner organizations about the COVID-19 Flexibilities with Medicare and MassHealth
- Federal and state government, national programs like NCOA educated partners on new rules that relieved consumers and counselors via virtual meetings, guides and mailings

Examples:

- Waiver of 3-day hospital stay for SNF coverage if the patient is affected by COVID-19
- Expanded telehealth benefits
 - Some MA plans may waive co-pays
- MA plans
 - Must charge in network costs for services received out-of-network
 - Referral and prior authorization requirements waived
- As of 3/18/20 Mass Health members will not lose coverage or have a decrease in their benefits during the Public Health Emergency (PHE)
- Self-attestation for eligibility factors (except citizenship and immigration)

Importance of Partners in Outreach

- Important eligibility changes- Medicare Savings plan-translated flyers & brochures to Meal on Wheels for placemats, brown bag lunches, CHCs, resident advisors
- SHINE shared NCOA & national info e.g. COVID Advocates Guide in well-received statewide trainings for hundreds of providers and partners organized by UMass, MH and Health Connector
- Webinars-Tenant Assistance Program, Boston Public Library, 3 Adult Ed Centers, DEAF consortium, private companies
- Created videos for MCOA for to distribute and post to almost 350 senior centers and cable TV channels
- MCOA has a reach of 454,656 consumers

SHINE website/Facebook pages

HOME ABOUT US MEDICARE MASSHEALTH OTHER RESOURCES VOLUNTEER VETERANS COVID-19 MORE



The SHINE Program

TO REACH A CERTIFIED MEDICARE COUNSELOR CALL

1-800-243-4636



SHINE Southeastern MA

Serving the Health Insurance Needs of Everyone (SHINE) provides free health insurance information, c

Posts About Photos Videos

Intro

- 102 Followers
- Page - Local Service
- 558 Plymouth Street, Middleboro, MA, United States, Massachusetts
- (800) 231-1155

Pinned Post

SHINE Southeastern MA
 March 8 at 11:15 AM · 🌐

Medicare Information Sessions are now on Zoom! New Dates Available!

Please join SHINE Program Regional Director, Christie Rexford, for an interactive Zoom presentation of Medicare 101: Understanding Your Medicare Benefits and Options

Several dates have been added: ... See More



facebook

Email or Phone Password Log In

Forgot account?



SHINE Central MA
 @SHINECentralMA

Home About Posts Videos Photos Community Reviews Events Create a Page



Like Share ... Learn More Send Message

Posts

SHINE Central MA
 5 hrs · 🌐

Need assistance with Medicare or have questions regarding your insurance? Please contact The SHINE Program to speak with a certified counselor. You can also visit our website at for other valuable information. Click on the link below.
<https://shinema.org/>



SHINE Central MA
 Local Service in Milford, Massachusetts
 Open Now

Community See All

118 people like this
 148 people follow this

About See All

80 North Bow Street (48.47 mi)
 Milford, MA, MA 01757
 Get Directions
 (800) 243-4636
 shinema.org
 Local Service
 Hours 9:00 AM - 5:00 PM
 Open Now

Medicare 101 Webinars (Zoom)



MEDICARE 101 *Introduction to Medicare*

zoom meeting

Join us for an Educational Meeting

APRIL 6 | 13 | 20 | 27

Tuesday | 3:30 pm

Hosted by The SHINE Program

The graphic features a blue header with the title 'MEDICARE 101 Introduction to Medicare'. Below the header are several overlapping icons representing Zoom meeting windows with different participants. The text 'Join us for an Educational Meeting' is centered in the middle. At the bottom, the dates 'APRIL 6 | 13 | 20 | 27' and time 'Tuesday | 3:30 pm' are displayed in large, bold letters. The host information 'Hosted by The SHINE Program' is in the bottom right corner of the graphic.

Creation of Videos



SHINE-Massachusetts SHIP
61 subscribers

CUSTOMIZE CHANNEL MANAGE VIDEOS

HOME VIDEOS PLAYLISTS CHANNELS ABOUT

Uploads **PLAY ALL**

The New Bedford Wilks Branch Library and the SHI... 2 views • 1 day ago

SHINE Counselor Appreciation 2021 12 views • 1 day ago

Creating a Secure Medicare account 7 views • 1 week ago

A Conversation with Kathy Devine of Prescription... 15 views • 1 week ago

A Conversation with Donna McCormick of the Medicare... 36 views • 2 months ago

Created videos on Medicare.gov accounts, Dental Options for Seniors, interviews with partner organizations, Medicare coverage during PHE, Checklist for OEP remote appointment, and Spanish language videos

SHINE-Massachusetts SHIP
61 subscribers

CUSTOMIZE CHANNEL MANAGE VIDEOS

HOME VIDEOS PLAYLISTS CHANNELS ABOUT

Uploads **PLAY ALL**

The New Bedford Wilks Branch Library and the SHI... 2 views • 2 days ago

SHINE Counselor Appreciation 2021 13 views • 2 days ago

Creating a Secure Medicare Account 7 views • 1 week ago

A Conversation with Kathy Devine of Prescription... 15 views • 1 week ago

A Conversation with Donna McCormick of the Medicare... 36 views • 2 months ago

Massachusetts College of Pharmacy and Health... 74 views • 2 months ago

SHINE Veterans Benefits Interview 87 views • 3 months ago

How to use Medicare Plan Finder: step by step. 34 views • 4 months ago

Shine 2020 Medicare Presentation for Seniors 60 views • 4 months ago

Common Health es adecuado para usted? 14 views • 4 months ago

¿Cómo recuperar tu usuario en MyMedicare.gov? 7 views • 6 months ago

Dental Options for Seniors 105 views • 6 months ago

¿Cómo recuperar tu contraseña en... 19 views • 6 months ago

¿Cómo recuperar tu usuario y contraseña en MyMedicare.gov? 3 views • 6 months ago

Flu Can Be Very Serious Flu Vaccine Protects 7 views • 6 months ago

Roll Up Your Sleeve for Your Annual Flu Vaccine 91 views • 6 months ago

Fall 2020 mailings 33 views • 6 months ago

How to Retrieve BOTH your User name and Password o... 91 views • 6 months ago

How to Retrieve Your UserName on... 33 views • 6 months ago

How to Reset Your MyMedicare.gov Password 70 views • 6 months ago

A Checklist for Preparing for Your Open Enrollment... 50 views • 6 months ago

Frail Elder Waiver: Help For Keeping Your Loved One at... 84 views • 7 months ago

COVID 19 Contact Tracing: What to Expect if You Get a... 61 views • 7 months ago

Free Medicare Benefits: Let SHINE help you do your... 180 views • 7 months ago

Is Common Health Right For You? 150 views • 7 months ago

Medicare Coverage During COVID 19 - Know your... 51 views • 7 months ago

SHINE Guidance for Enrolling in Medicare after a Job Loss 59 views • 7 months ago

SHINE IS STILL OPEN FOR BUSINESS 45 views • 7 months ago

See if You Can Save on Your Medicare Costs With the... 79 views • 7 months ago

Frank and Mary in Framingham COVID 19 35 views • 7 months ago



Ensuring that SHINE is available

- Critical to communicate that counselors are working by phone, email, Zoom and that constant training continues
- Also, critical to assure that SSA, MH offices are open and working with partners on complex cases continues
- Partnerships enabled counselors to share food resource info, SNAP, new plan flexibilities, transportation, Mom's meals, etc.
- May not be in person, but still effective and trusted source for unbiased, comprehensive health insurance information

What will continue

- SCSEP Project worked well, and we will continue to collaborate with the program to work on projects in the future
- Creating a Pharmacists Counselor Recruitment Project
- Remote Counseling
- Use of remote counseling tools

How to Contact SHINE



SHINE

1-800-243-4636

SHINE@mass.gov

www.ShineMA.org

<https://massoptions.org>



Massachusetts Senior Medicare Patrol Program

Presentation by Caroline Louise Cole
Coordinator of Volunteers and Media Liaison
978-946-1256
CCole@EMSV.org



MA SMP by the Numbers

- 80 Individuals have been active with MA SMP during the Pandemic period
- Total number of hours contributed is 6,401.48
- Value of this contribution is \$210.991 based on an hourly rate of \$32.96, which is set by the Independent Sector.
- Total number of complaints logged during this period:



New Initiatives During Covid-19

- New Tools
- New Ways to Get Involved
- New Training Opportunities
- New Materials
- Extra Appreciation for Extra Ordinary Efforts



MA SMP Volunteers



Copyright © 2021 Massachusetts Senior Medicare Patrol Program

Page 25



2021 SMP/SHIP National Conference
Virtual Meeting • Part One—April 27-29, 2021

New Initiatives During Covid-19

Moving MA SMP Forward Committee

Presentation Revamping Committee

Regular Scam Alert fliers

Monthly MA SMP Team Member training meetings
with speakers

Ambulance Task Force



New Initiatives During Covid-19



Three-cheers to you, our valued MA volunteer!

The Massachusetts Senior Medicare Patrol Program would be nothing without the tireless energy and enthusiasm and caring of our dedicated volunteers.

Grab a cup of coffee or beverage of your choice this **Wednesday, April 29, at 10:00 a.m.** and please allow us to thank you, even if just virtually, as part of National Volunteer Appreciation Month. We will be using the Zoom conferencing app.

[Click here to join our Volunteer Appreciation Coffeehour!](#)

To call in by phone: 646-876-9923

Meeting ID: 982 9080 4953

Password: 717 755

New Initiatives During Covid-19



Copyright © 2021 Massachusetts Senior Medicare Patrol Program

Page 28

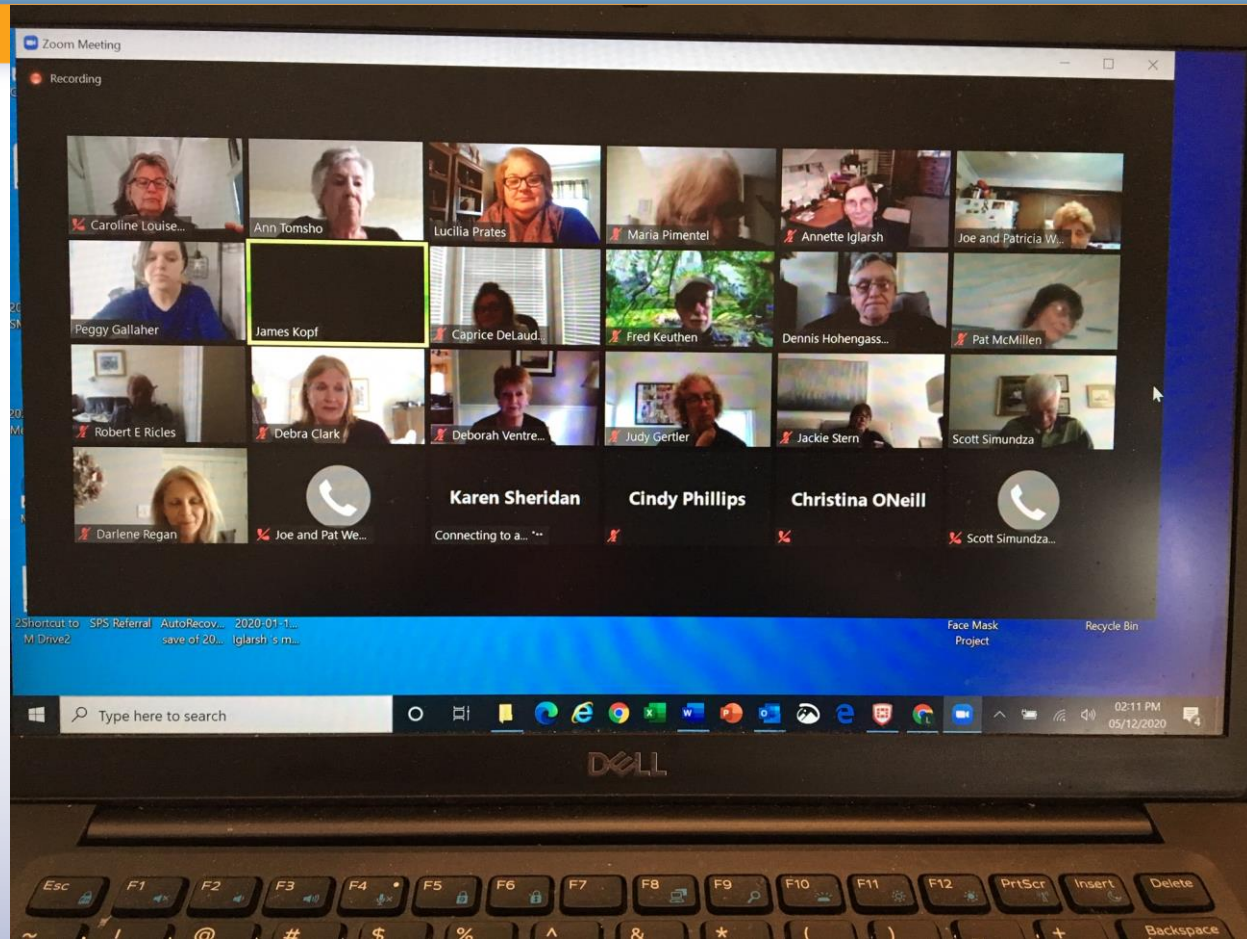


2021 SMP/SHIP National Conference
Virtual Meeting • Part One—April 27-29, 2021

New Initiatives During Covid-19

The MA SMP Program Holds bi-annual training meetings.

Our May 12, 2021 retreat went ahead as planned, on Zoom, of course.



New Initiatives During Covid-19

MA SMP Team
Member Dennis
Hohengasser taping
MA SMP Group
Education Session at
the East Bridgewater
Community Television
studio.



New Initiatives during Covid-19

Lucilia Prates-Ramos at a taping of an MA SMP Program with interviewer Harry Rock at the Westfield, MA community TV studio.



New Initiatives during Covid-19



MA SMP Team Member Maria Pimentel chatting with Lorraine Thompson about the MA SMP mission and message.



New Initiatives During Covid-19

MA SMP Team Member Jackie Stern delivering MA SMP presentation during a live call-in TV program in Watertown, MA.

MA SMP on Watertown TV



Copyright © 2021 Massachusetts Senior Medicare Patrol Program

Page 33



2021 SMP/SHIP National Conference
Virtual Meeting • Part One—April 27-29, 2021

Getting our message out when we can

MA SMP Team Member
Deb Clark preparing to
go on live on WXTK FM
Radio 95.1 serving the
Cape Cod community.



Copyright © 2021 Massachusetts Senior Medicare Patrol Program

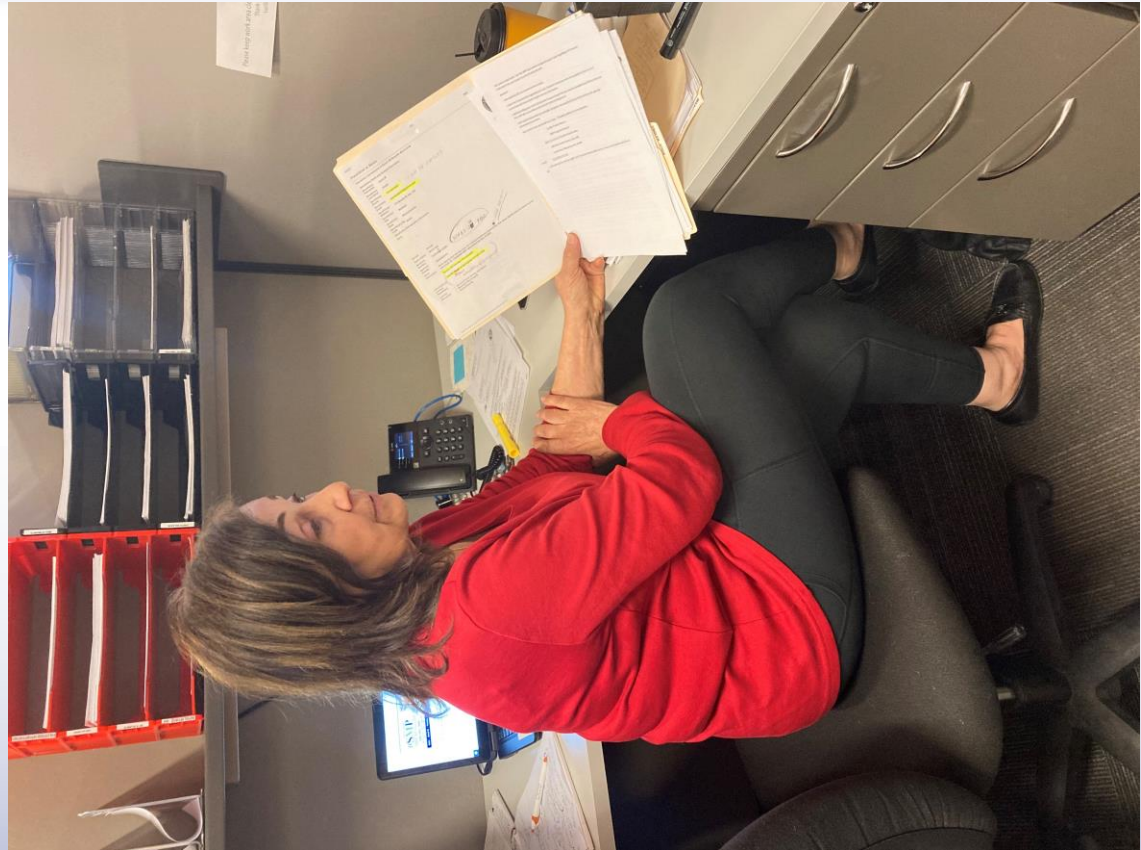
Page 34



2021 SMP/SHIP National Conference
Virtual Meeting • Part One—April 27-29, 2021

Delivering services, no matter the challenge

MA SMP Team Member Judy Farah working on a report of potential fraud.

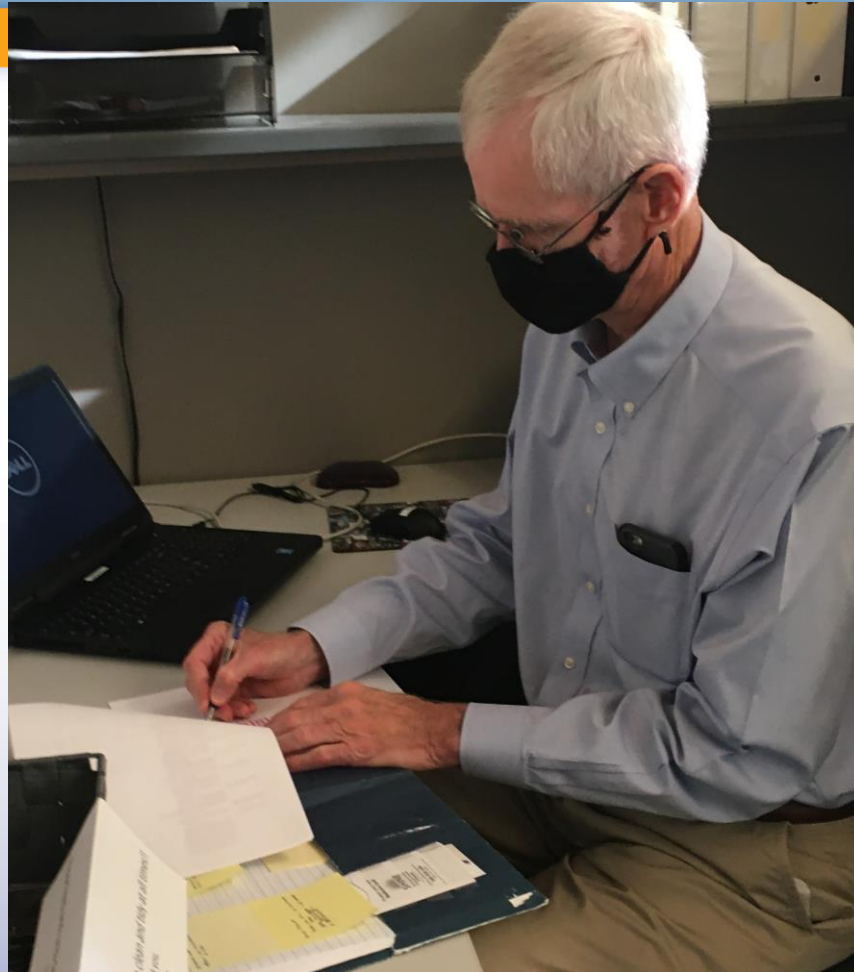


Copyright © 2012 Massachusetts Senior Medicare Patrol Program

Page 35

Delivering services no matter the challenge

A few of our MA SMP Team Members continued coming into our office working with masks on. Here Scott Simundza is working on a billing issue for an MA SMP client.



Copyright © 2012 Massachusetts Senior Medicare Patrol Program

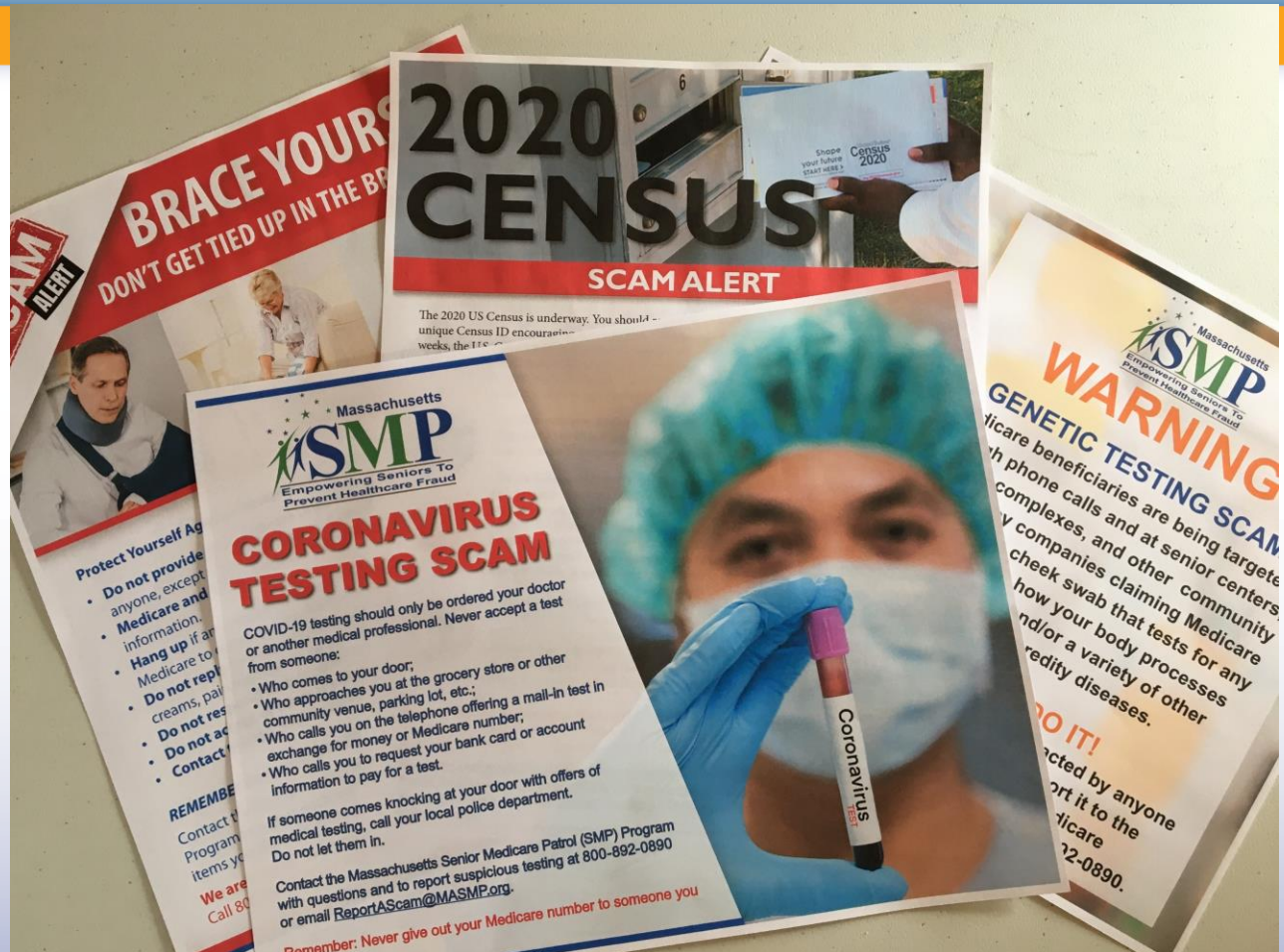
Page 36

Delivering services no matter the challenge

Moui Lam, our SMP Team Member at the Merrimack Valley Immigrant and Education Center went the extra mile to help her Chinese-speaking clients.



Doing what we do only better



New initiatives during Covid-19

MA SMP
Thanksgiving
logo
napkin
distributed
in Meals on
Wheels and
Grab 'n Go
lunches.



New initiatives during Covid-19

Westfield Senior Center Director Tina Gorman, center, with Karen Noblit and Mary Lou Niedzielski of her staff preparing to distribute MA SMP napkins in Thanksgiving meals.



CONFERENCE ANNOUNCEMENT

Friday, May 7, 2021

Virtual Conference 9:00 a.m. to 4:30 p.m.

ENGAGEMENT & INCLUSION = HEALTH EQUITY & QUALITY



KEYNOTE SPEAKER

Dr. Donald M. Berwick is President Emeritus and Senior Fellow at the Institute for Healthcare Improvement (IHI), an organization he co-founded and led as President and CEO for 19 years. He is one of the nation's leading authorities on health care quality and improvement. In July 2010, President Obama appointed Dr. Berwick to the position of Administrator of the Centers for Medicare and Medicaid Services (CMS), which he held until December 2011.

KEY CONFERENCE TOPICS

- ❖ Taking a hard look at the long-lasting impacts of COVID-19
- ❖ How can we achieve health equity for all?
- ❖ Where are we with electronic health records (EHR)?
- ❖ Examining the root causes of systemic racism and how it has contributed to health inequities
- ❖ Looking at the financial and human cost of healthcare errors, fraud and abuse



\$25 Registration Fee **\$15** Students **\$35** with CEUs
RN and SW CEUs have been applied for. Limited scholarships available.



Copyright © 2021 Massachusetts Senior Medicare Patrol Program

Page 41



2021 SMP/SHIP National Conference
Virtual Meeting • Part One—April 27-29, 2021

MA SMP Staff Team



Lucilia Prates-Ramos

Statewide Director

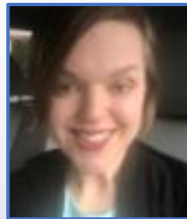
978-946-1326 ♦ LPrates@ESMV.org



Caroline Louise Cole

Coordinator of volunteers and media liaison

978-946-1256 ♦ CCole@ESMV.org



Peggy Gallaher

Program assistant

978-946-1352 ♦ MGallaher@ESMV.org



GRACIAS

Vielen
Dank

Teşekkürler

Köszönettel

THANK YOU

Bedankt

Grazie

Ευχαριστώ

ขอบคุณ

Massachusetts
SMP
Empowering Seniors To
Prevent Healthcare Fraud

شكراً

Díky

Hvala

Copyright © 2021 Massachusetts Senior Medicare Patrol Program

Page 43

Questions