



# 2019 SMP/SHIP NATIONAL CONFERENCE

## Manage Data Like Rock**STARS!**

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July 22–25, 2019 • San Diego, CA



# Nebraska SHIP

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In the session you will learn how Nebraska:

- Collects, enters and manages data
- Tracks saving
- Uses data to promote and motivate

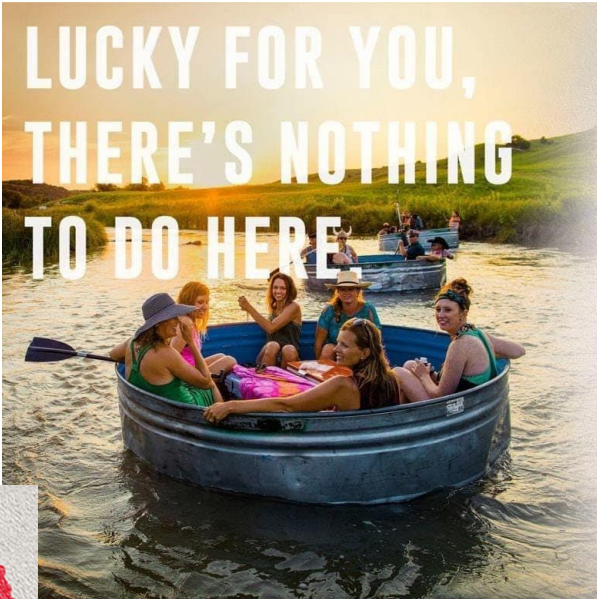
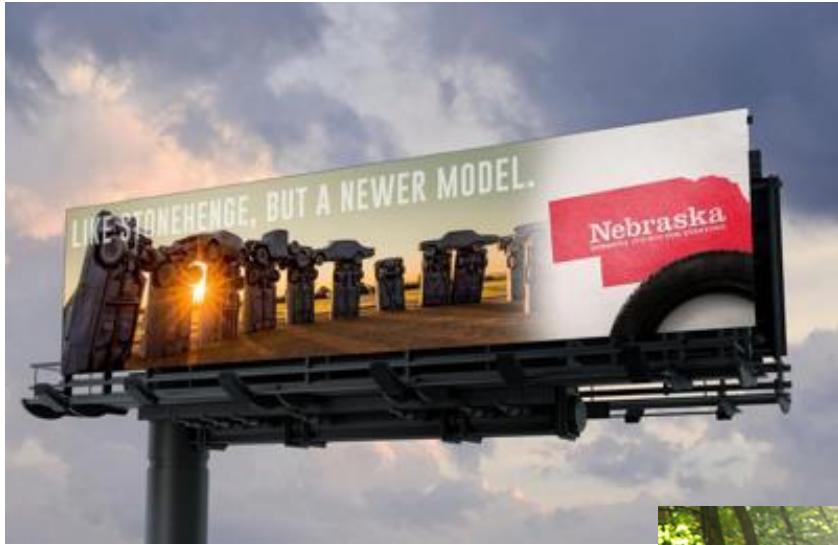


# But First.....

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Let's learn about Nebraska!





# Nebraska SHIIP

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Nebraska SHIIP is a division of the Nebraska Department of Insurance (DOI)

- The SHIIP program contracts with Nebraska Area Agencies on Aging and other nonprofit organization to provide services statewide.
- SHIIP has a network of both Certified and Non-Certified Counselors trained to help people with Medicare.

**NEBRASKA**

Good Life. Great Opportunity.

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DEPARTMENT OF INSURANCE

# Nebraska SHIP

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Nebraska SHIP manages the following programs

- SHIP
- SMP
- MIPPA



# Nebraska SHIIP

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## 344 Certified Counselors

- 180 Professionals (52%) and 164 True (48%)

## 7 Regional Offices

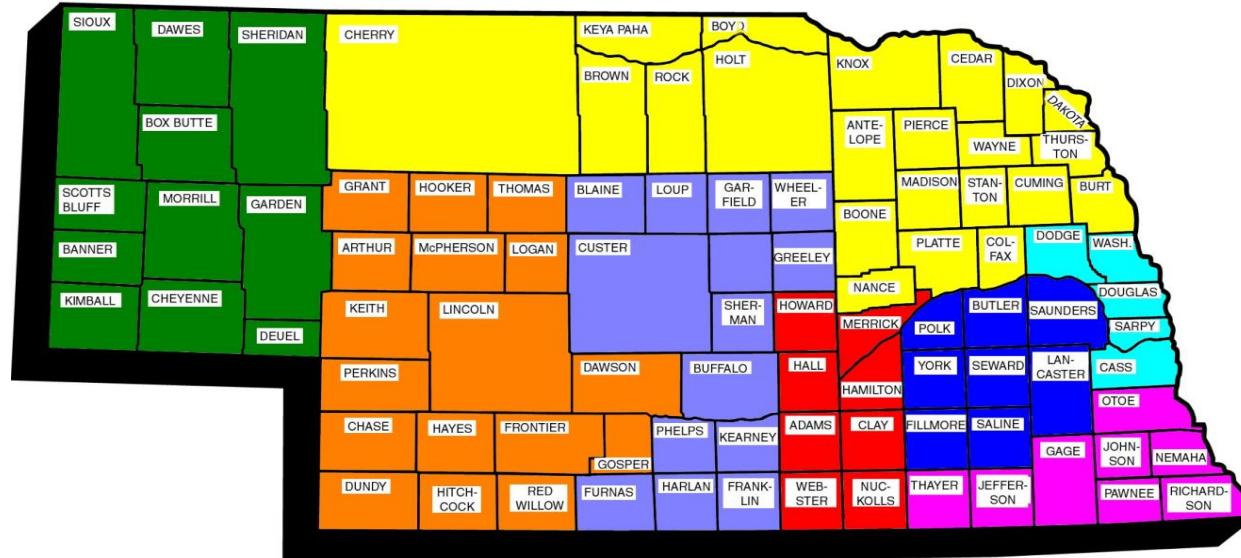
- Oversee volunteers and activities in their area

## SHIIP Program Office in Lincoln

- Program oversight, provide training and educational resources, SHIIP promotion/advertising
- 



# Nebraska SHIIP Organization



- Western (Scottsbluff)
- Northeast (Norfolk)
- West-Central (North Platte)
- South-Central (Kearney)

- Midland (Grand Island)
- Lincoln (Lincoln)
- Eastern (Omaha)
- Blue Rivers (Lincoln)

# Nebraska Facts

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1,929,000 total population in 2018

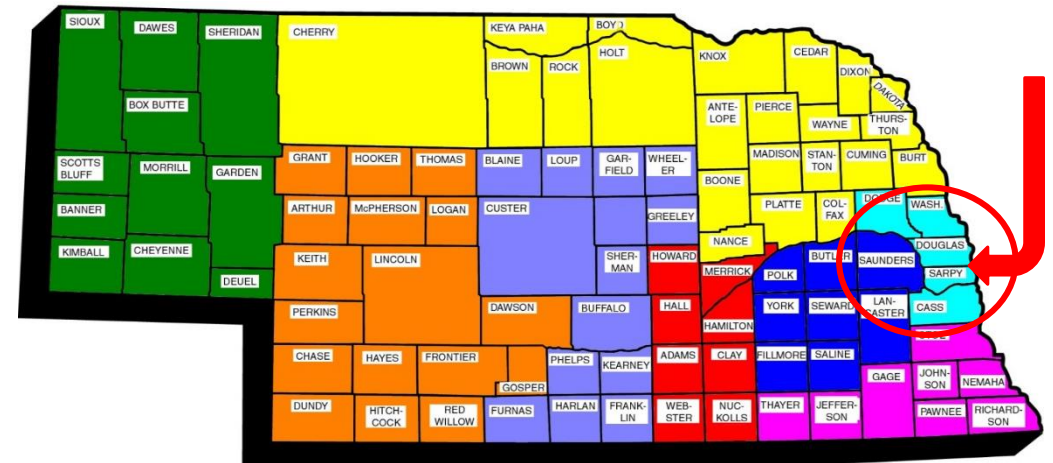
- 1,306,973 (68%) of residents live within the Lincoln/Omaha Metro areas

341,341 Nebraskans receiving Medicare

- 182,528 (53%) of Medicare benes live in seven county area

77,347 square miles in total

- Ranked 16<sup>th</sup> state by area
- Ranked 37<sup>th</sup> state by population



# 2018

**BEST YEAR EVER**

# Nebraska SHIP Data Snapshot

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## Client Contact

- 34,052 Total Contacts
  - Part D – 74%
  - Medicare Fraud and Abuse – any category – 53%
  - Medicare Part A/B – 34%
  - New Medicare Cards – 33%
  - Medicare Supplements – 22%
  - Medicare Advantage Plans – 14%



# Nebraska SHIP Data Snapshot

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As a state, we reached almost 10% of our Medicare beneficiaries


A large, 3D-rendered blue graphic of the number '10%' is centered on the page. The numbers and the percentage symbol are thick and have a slight shadow and reflection on the surface below them. The background is white, and the bottom of the slide features a decorative wave-like shape with a yellow top edge and a green bottom edge.

10%

# Nebraska SHIP Data Snapshot

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As a program we dedicated **20,486** hours to counseling Medicare beneficiaries!!

- Averages 3,573 minutes (59.5 hours) per counselor
  - Averages 36 minutes per counseling session
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# Nebraska SHIP Data Snapshot

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As a program we helped Nebraskans save

**\$25,887,572!!!**

That is \$8,000,000 more than we  
have ever saved!



# Nebraska SHIP Data Snapshot

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This means that for every \$1 we received in SHIP funding we saved Nebraskans \$64.41!

**\$1 = \$64.41**






# Nebraska Data

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Recently, Nebraska has taken a more hands on approach with our data

- Tells our story
  - Directs our focus
  - Uncovers issues in our processes
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# Collecting Data

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Because we have a mixture in volunteer type, age range, and computer knowledge we want to offer multiple ways to collect data


- Directly enter into the STARS system
- Paper contact forms
- Spreadsheet
- Monthly contact with volunteers
  - This is a option we are piloting in a few regions



# Collecting Data

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As a state with a high number of professional volunteers we face unique challenges related to reporting

- Professionals are VERY busy
  - They come to training
  - They call with questions for clients
  - They request materials
  - **OBVIOUSLY they are doing the work, BUT many aren't reporting**
- 

# Collecting Data

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To better capture the impact our program has on the state, SHIIP decided to take a more hands on approach with professionals

- Regional Rep identified those who are reaching out but not reporting data
- Each volunteer was called and our rep talked to them about the work they do and how it relates to Medicare
- Specifically, we asked why they were not reporting data

# Collecting Data

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So, what did we find?

- ALL volunteers we reached out to are doing SHIP related work on a daily/weekly basis
- Many volunteers felt overwhelmed with current duties and were unable to take time to submit individual data
- Some volunteers didn't see the connection between SHIP and their work
- **Some volunteers had HIPPA concerns about sharing patient info**

# Collecting Data

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## What's the solution?

- Our volunteers concerns were very valid, we needed to give them better options if we wanted to collect their data
- SHIP now accepts monthly reports from these volunteers with minimal info
  - Report is typically promoted by a phone call from us
  - Volunteer shares how many people they assisted that month and the topics
    - Most of our volunteers work in a very specific field and always speak on the same items



# Collecting Data

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## Example: Taylor

- Taylor admits people into a SNF in Lincoln. She typically admits 10 people per week. Each person has a one-on-one conversation with Taylor about their Medicare coverage related to SNF. Based on an initial conversation with Taylor, we determined each conversation is about 30 minutes and they are discussing Original Medicare benefits. We use the zip code of the SNF.
  - We don't collect name, age, race, income or any other identifying information
- Monthly our rep calls Taylor to see how many people she admitted
- These contacts are then entered into the STARS system by the SHIP office



State of Beneficiary Residence  R

Zip Code of Beneficiary Residence  R

County of Beneficiary Residence  R

Date of Contact  📅 (mm/dd/yyyy) R

How Did Beneficiary Learn About SHIP  R

Method of Contact  R

Beneficiary Age Group  R

Beneficiary Gender  R

Beneficiary Race  R

- 64 or Younger
- 65-74
- 75-84
- 85 or Older
- Not Collected
- Hispanic or Latino
- Native Hawaiian or Other Pacific Islander
- White
- Not Collected

English as a Primary Language  Yes  No R

Beneficiary Monthly Income  R (The 150% FPL monthly income limit for 2019 is \$1,561.25 for an individual, and \$2,113.75 for a couple.)

Beneficiary Assets  R (The 2019 LIS asset limit is \$14,390 for an individual, and \$28,720 for a couple.)

Receiving or Applying for Social Security Disability or Medicare Disability  Yes  No R

### Topics Discussed

At least one Topic Discussed selection is required. Please choose a Topic before continuing.

Original Medicare (Parts A & B)

- Appeals/Grievances
- Benefit Explanation
- Claims/Billing
- Coordination of Benefits
- Eligibility
- Enrollment/Disenrollment
- Fraud and Abuse
- Other

Medigap and Medicare Select

- Benefit Explanation
- Claims/Billing
- Eligibility/Screening
- Fraud and Abuse
- Other

# Collecting Data


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In 2018, in only one of our eight regions, this strategy collected **1,500 additional contacts**

# Managing Data

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Nebraska SHIP administers SHIP, SMP, and MIPPA

- Collecting data for three programs can be difficult
  - We have combined our three reporting requirements into one form
  - STARS is setup the same way
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# Managing Data

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While people can report data for all three programs in one spot, we find volunteers (and staff) are regularly forgetting to give MIPPA and SMP credit

- They are checking that they discussed fraud but not checking “Send to Sirs”
- They are checking that they completed an LIS app but not checking yes to “MIPPA”

The screenshot shows a web application interface with a navigation bar at the top containing 'HOME', 'TRACKING INBOX', 'SEARCH', 'REPORTING', and 'CONFIGURATION'. Below the navigation bar is a breadcrumb trail: 'Tracking Inbox » New Beneficiary Contact »'. The main content area contains a form with the following fields:

MIPPA	<input type="radio"/> Yes <input checked="" type="radio"/> No <span style="color: red;">R</span>
Send to SMP	<input type="radio"/> Yes <input checked="" type="radio"/> No
SIRS eFile ID	<input type="text"/>

# Managing Data

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How do we fix it?

- We do manual data checks and correct any data that fits the criteria for our programs



Home »

Tracking Inbox : Beneficia

- MY SAVED SEARCHES
- SHARED SEARCHES
- DASHBOARD OPTIONS
- BENEFICIARY CONTACT**
- GROUP OUTREACH AND EDUCATION
- MEDIA OUTREACH AND EDUCATION
- SHIP TEAM MEMBER

Assignments ▼

Beneficiary First Name	Benef Name			STANDARD SEARCH	County of Session Location	Zip Code of Session Location	State of Session Location
▶ Michael	Watsc			<b>ADVANCED SEARCH</b>	Lancaster - NE	68510	Nebraska
▶			19	25254441	Lancaster - NE	68508	Nebraska
▶			19	NE-19-25254564	Lancaster - NE	68508	Nebraska
▶ Dave	Buchf		19	NE-19-25254523	Lancaster - NE	68508	Nebraska
▶ Carrie	Banks	05/30/2019		NE-19-25254533	Lancaster - NE	68508	Nebraska
▶ Willie	Banks	05/30/2019		NE-19-25254552	Lancaster - NE	68508	Nebraska

**Search Criteria**

Columns

Organizational Unit

Display Options

Properties

Save Search

Save As...

Shared Permissions

My Saved Searches

Standard Search

Search

**Data Object**

Beneficiary Contact  
SHIP Beneficiary Additiona

**Data Element**

Medicaid  
Medicare Advantage MA an  
Medicare Part D  
Medigap and Medicare Sele  
Method of Contact  
Notes  
Original Medicare Parts A a  
Other Insurance  
Other Prescription Assistanc  
Part D Low Income Subsidy  
Partner Organization Affiliati

**Operator**

CONTAINS ANY  
CONTAINS ALL  
DOES NOT CONTAIN  
IS BLANK  
IS NOT BLANK

**Value**

- Appeals/Grievances
- Benefit Explanation
- Claims/Billing
- Coordination of Benefits
- Eligibility
- Enrollment/Disenrollment
- Fraud and Abuse
- QIO/Quality of Care

Add As Column

Add

LOGICAL OPERATOR

- ALL criteria below must be true (AND)  AT LEAST ONE criteria below must be true (OR)

	Data Object	Data Element	Operator	Value		
<input checked="" type="checkbox"/>	Beneficiary Contact	Date of Contact	BETWEEN	05/01/2019 and 05/31/2109		
<input checked="" type="checkbox"/>	Beneficiary Contact	Send to SIRS	EQUAL TO	No		

Search Criteria

Columns

Organizational Unit

Display Options

Properties

Save Search

Save As...

Shared Permissions

My Saved Searches

Standard Search

Search

Data Object

Beneficiary Contact  
.SHIP Beneficiary Additiona

Data Element

Operator

Value

Add As Column

Add

LOGICAL OPERATOR

ALL criteria below must be true (AND)  AT LEAST ONE criteria below must be true (OR)

	Data Object	Data Element	Operator	Value		
<input checked="" type="checkbox"/>	Beneficiary Contact	Send to SIRS	EQUAL TO	No ★		
<input checked="" type="checkbox"/>	Beneficiary Contact	Date of Contact	BETWEEN	05/01/2019 and 05/31/2019		
<input checked="" type="checkbox"/>	Beneficiary Contact	Original Medicare Parts A and B	CONTAINS ANY	• Fraud and Abuse		
<input type="checkbox"/>	Beneficiary Contact	Medicare Part D	CONTAINS ANY	• Fraud and Abuse		
<input type="checkbox"/>	Beneficiary Contact	Medicare Advantage MA and MA PD	CONTAINS ANY	• Fraud and Abuse		
<input type="checkbox"/>	Beneficiary Contact	Medicaid	CONTAINS ANY	• Fraud and Abuse		
<input type="checkbox"/>	Beneficiary Contact	Medigap and Medicare Select	CONTAINS ANY	• Fraud and Abuse		
<input type="checkbox"/>	Beneficiary Contact	Additional Topic Details	CONTAINS ANY	• New Medicare Card		

Check one at a time




Search Criteria


Columns


Organizational Unit


Display Options


Properties

 Save Search

 Save As...

 Shared Permissions

 My Saved Searches

 Standard Search

Search

DISPLAY AS

- HTML
- DOC
- XLS (Prior to Excel 2007 max rows allowed = 65,536)

DISPLAY IN

- New Window
- Same Window

DISPLAY SUMMARY

- Display Search Summary
- Hide Search Summary

This provides for the easiest format to edit data



	Beneficiary First Name	Beneficiary Last Name	Date of Contact ↕	SHIP Case Number	County of Session Location	Zip Code of Session Location	State of Session Location	Total Time Spent
▶	Michael	Watson	06/05/2019	NE-19-25254441	Lancaster - NE	68510	Nebraska	15
▶			05/31/2019	NE-19-25254564	Lancaster - NE	68508	Nebraska	20
▶	Dave	Buchholz	05/30/2019	NE-19-25254523	Lancaster - NE	68508	Nebraska	30
▶	Carrie	Banks	05/30/2019	NE-19-25254533	Lancaster - NE	68508	Nebraska	60
▶	Willie	Banks	05/30/2019	NE-19-25254552	Lancaster - NE	68508	Nebraska	65
▶			05/29/2019	NE-19-25254509	Lancaster - NE	68508-6850	Nebraska	20
▶			05/28/2019	NE-19-25254454	Lancaster - NE	68508	Nebraska	15
▶			05/28/2019	NE-19-25254472	Lancaster - NE	68508	Nebraska	30
▶			05/24/2019	NE-19-25254359	Lancaster - NE	68508	Nebraska	15
▶			05/24/2019	NE-19-25254373	Lancaster - NE	68508	Nebraska	10
▶	Ronald	Smythe	05/21/2019	NE-19-25254330	Lancaster - NE	68508	Nebraska	20
▶			05/21/2019	NE-19-25254344	Lancaster - NE	68508	Nebraska	45
▶			05/20/2019	NE-19-25253807	Lancaster - NE	68508	Nebraska	20

Beneficiary Contact

SHIP Beneficiary Additional Sessions

MIPPA

Yes  No R

Send to SMP



Yes  No

SIRS eFile ID

SIRS Reference Number

SHIP Reference Number

NE-19-25254523

Session Conducted By

Alicia Jones ▼ R

Partner Organization Affiliation

Nebraska SHIP

Zip Code of Session Location

68508 R

State of Session Location

Nebraska ▼ R

County of Session Location

Lancaster - NE ▼ R

Beneficiary First Name

Dave

Beneficiary Last Name

Buchholz

Beneficiary Phone Number

Beneficiary Email

Representative First Name

# Managing Data

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## Managing MIPPA data

- This works the same with different search criteria

Search Criteria

Columns

Organizational Unit

Display Options

Properties

Save Search

Save As...

Shared Permissions

My Saved Searches

Standard Search

Search

Data Object

Beneficiary Contact  
.SHIP Beneficiary Additiona

Data Element

Operator










Value

Add As Column

Add

LOGICAL OPERATOR

ALL criteria below must be true (AND)  AT LEAST ONE criteria below must be true (OR)

	Data Object	Data Element	Operator	Value		
<input checked="" type="checkbox"/>	Beneficiary Contact	MIPPA	EQUAL TO	No 		
<input checked="" type="checkbox"/>	Beneficiary Contact	Date of Contact	BETWEEN	05/01/2019 and 05/31/2019		
<input checked="" type="checkbox"/>	Beneficiary Contact	Part D Low Income Subsidy LIS and Extra Help	CONTAINS ANY	<ul style="list-style-type: none"><li>Application Assistance</li><li>Application Submission</li><li>Benefit Explanation</li><li>Eligibility/Screening</li></ul>		
<input type="checkbox"/>	Beneficiary Contact	Medicaid	CONTAINS ANY	<ul style="list-style-type: none"><li>Application Submission</li><li>Benefit Explanation</li><li>Eligibility/Screening</li><li>Medicaid Application Assistance</li><li>MSP Application Assistance</li><li>Recertification</li></ul>		



Savings

# Tracking Savings

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Nebraska has been tracking savings for the past four years

- 2018 - \$25,887,572
- 2017 – \$17,586,222
- 2016 - \$15,616,404
- 2015 - \$14,117,839
- **Total Saved - \$73,208,012**

# Tracking Savings

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Due to STARS, we are now able to split our savings by source and have more accountable data

- Nebraska Tracks
  - Part D Savings
  - LIS and MSP Savings
  - Savings from appealing denied claims
  - Premium savings from switching insurance, typically Supplements



# Tracking Savings

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In 2018, SHIIP saved \$25,887,572

- Part D Savings - \$20,517,777.54
  - We have the documents to back it up!
- Other Savings - \$5,610,476.90



## HOW TO SAVE REPORTING INFO ON A FLASH DRIVE

Right before you enroll anyone in a drug or Advantage plan, be sure to save their **Plan Results** page and **Enrollment Confirmation** page to your flash drive-use the steps below to help with the process.

1. Insert the flash drive into the USB port on your computer
2. Before completing the enrollment, return to the **"PLAN RESULTS"** page
3. Right click your mouse anywhere on the screen
4. Click on **"PRINT"**
5. Click on **"CHANGE"** and switch it to **"SAVE AS PDF"**
6. Click on the blue **"SAVE"** button
7. Once you click on save, you will receive a **"SAVE AS"** box and you can select where you want to save it
8. Look for **"USB DRIVE"** or **"REMOVEABLE DRIVE"** or some similar wording and click on that
9. You will need to name the file, use the beneficiary's first and last name followed by the number 1, ie: **Jane Smith1**
10. Once you have named the file and selected your flash drive as the location to save it to, click **"SAVE"**
11. Repeat steps 1-9 to save the Enrollment Confirmation page. Name this file with beneficiary's first and last name followed by the number 2, ie: **Jane Smith**
12. Once you have named the Enrollment Confirmation page, click **"SAVE"**

**Your Plan Results**

Original Medicare (66001-001-01)

Estimated Annual Premium	Monthly Premium	Out-of-Pocket (COO) and Out-of-Pocket Maximum	Drug Coverage	Group Coverage	Subsidized Premium	Out-of-Pocket Maximum
\$0.00	\$0.00	\$0.00	Original Medicare (66001-001-01)	Original Medicare (66001-001-01)	\$0.00	\$0.00

Prescription Drug Plans

Compare Plans

## Nebraska SHIP - Tracking Potential Savings Tip Sheet

\*Please remember there will not be a savings for every client and that's OK!

If you aren't sure, ask your rep!

### Part D Comparison - Not a set amount, savings is determined by the situation

- **How to Calculate:** Take the total cost for the old Part D Plan and subtract the total cost for the new plan. Medicare.gov will give you these figures, all you need to do is subtract.
- **When to Count:** If you run a comparison for a person and there is a savings by switching plans, you can count that as a potential savings.
- **Ex) Marie** comes to you to compare Part D plans for next year. Currently she has Aetna. If she stays with Aetna, her yearly cost would be \$4,320. If she switches to AARP, the yearly cost would be \$2,670. You can count \$1,650 as potential savings.

### LIS Application - \$4,900

- **How to Calculate:** There is no need to calculate this one; SSA has done it for us. Social Security estimates that the LIS benefit is worth \$4,900 annual.
- **When to Count:** If you assist someone in completing an LIS application, and it appears that their income and assets are within the guidelines, you can count \$4,900 as a potential savings.
- **Ex) Heather** calls you because she has hit the donut hole and can no longer afford her prescriptions. You screen her for LIS. She is single and makes \$1,300 a month. She only has \$4,500 in assets. You assist her in completing an LIS application. You can count \$4,900 as potential savings.

### Medicaid Application - \$6,526 (2019)

- **How to Calculate:** SHIP uses a set amount to calculate Medicaid applications, a total of \$6,526 which includes \$4,900 for drug assistance and \$1,626 in Part B premiums (2019).
- **When to Count:** If you assist someone in completing a Medicaid application, and it appears that their income and assets are within the guidelines, you can count \$6,526 as a potential savings.
- **Ex) Bill** calls you because he can't afford his insurance premiums. You screen him for Medicaid. He is single and makes \$1,100 a month. He has no assets. You assist him in completing a Medicaid application. You can count \$6,526 as potential savings.

### Denied Claims – Not a set amount, savings is determined by the situation

- **How to Calculate:** Take the total amount of the claim and subtract the co-pay/coinsurance that is left after the claim is paid.
- **When to Count:** If you assist someone in correcting or appealing a denied claim, you can count the savings.
- **Ex) Lydia's** ambulance ride was denied due to not being medically necessary. The total charge was \$550. You helped Lydia appeal and eventually Medicare approved the claim. Lydia now owes \$110. You can count \$440 as an annual potential savings.

### Switching Insurance Policies – Not a set amount, savings is determined by the situation

- **How to Calculate:** If a person switches insurance plans (employer coverage, supplement companies, MA plans, etc.). Take the total cost for the old plan and subtract the total cost for the new plan.
- **When to Count:** If you assist someone and they make the decision to switch to an option that will save money, you can count the potential savings.
- **Ex) Hank** currently has a supplement with Company X that costs \$278 per month. You run him a comparison. He applies for and is accepted for a supplement with Company Z for \$150 per month. You can count \$1,536 as an annual potential savings.

Time Spent in Hours

Enter Time Spent in Hours OR Minutes. Example: 1.5 hours Time Spent would be entered as either 1 Hour and 30 Minutes OR 0 Hour and 90 Minutes.

Time Spent in Minutes

Total Time Spent (minutes)

Status

Special Use Fields

Original PDP/MA-PD Cost

← Current Part D Plan

New PDP/MA-PD Cost

← New Part D Plan

Field 3

Other Savings  
LIS App →

Field 4

Field 5

Notes

Attach File

Browse

Attach File

Browse

Attach File

Browse

Attach File

Browse

Attach File

Browse

Save

Spell Check

# Tracking Savings

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Now everyone is reporting savings into STARS, **how do we get the data in a useful form?**



# What are you looking for?

HOME TRACKING INBOX **SEARCH** REPORTING CONFIGURATION

Search » Advanced Search (Beneficiary Contact)

Search Criteria Columns Organizational Unit Display Options Properties

Save Search Save As... Shared Permissions My Saved Searches Standard Search Search

**Data Object**  
Beneficiary Contact  
.SHIP Beneficiary Additiona

**Data Element**  
Additional Topic Details  
Beneficiary Age Group  
Beneficiary Assets  
Beneficiary Email  
Beneficiary First Name  
Beneficiary Gender  
Beneficiary Last Name  
Beneficiary Monthly Income  
Beneficiary Phone Number  
Beneficiary Race  
Country of Beneficiary Resid

**Operator**  
EQUAL TO  
NOT EQUAL TO  
LIKE  
NOT LIKE  
STARTS WITH  
ENDS WITH  
IS BLANK  
IS NOT BLANK

**Value**  
 Add As Column  
Add

	Data Object	Data Element	Operator	Value		
<input checked="" type="checkbox"/>	Beneficiary Contact	Date of Contact	BETWEEN	05/01/2019 and 05/31/2019		

In this case I want to see data from a specific timeframe.

# What do you want to view?

HOME TRACKING INBOX **SEARCH** REPORTING CONFIGURATION

Search > Advanced Search (Beneficiary Contact)

Search Criteria **Columns** Organizational Unit Display Options Properties

Save Search Save As... Shared Permissions My Saved Searches Standard Search Search

### Column Selector

Beneficiary Contact  
SHIP Beneficiary Additional Sessions  
Assignments

- Beneficiary Email
- Beneficiary First Name
- Beneficiary Gender
- Beneficiary Last Name
- Beneficiary Monthly Income
- Beneficiary Phone Number
- Beneficiary Race
- County of Beneficiary Residence
- County of Session Location
- Date of Contact
- English as a Primary Language
- Field 1
- Field 2
- Field 3
- Field 4
- Field 5
- How Did Beneficiary Learn About SHIP
- MIPPA
- Medicaid
- Medicare Advantage MA and MA PD
- Medicare Part D
- Medicaid and Medicare Select

Check any field that you want to view

### Column Editor

Data Object	Data Element	Label	Sort
<input checked="" type="checkbox"/>	Beneficiary Contact	Date of Contact	Date of Contact
<input checked="" type="checkbox"/>	Beneficiary Contact	Partner Organization Affiliation	Partner Organization Affiliatio
<input checked="" type="checkbox"/>	Beneficiary Contact	Session Conducted By	Session Conducted By
<input checked="" type="checkbox"/>	Beneficiary Contact	Beneficiary First Name	Beneficiary First Name
<input checked="" type="checkbox"/>	Beneficiary Contact	Beneficiary Last Name	Beneficiary Last Name
<input checked="" type="checkbox"/>	Beneficiary Contact	Field 1 ★	Field 1
<input checked="" type="checkbox"/>	Beneficiary Contact	Field 2 ★	Field 2
<input checked="" type="checkbox"/>	Beneficiary Contact	Field 3 ★	Field 3

These are what have been selected and will show in your results

# How do you want to view it?

HOME TRACKING INBOX **SEARCH** REPORTING CONFIGURATION

Search » Advanced Search (Beneficiary Contact)

Search Criteria

Columns

Organizational Unit

Display Options

Properties

 Save Search

 Save As...

 Shared Permissions

 My Saved Searches

 Standard Search

Search

DISPLAY AS

- HTML
- DOC
- XLS (Prior to Excel 2007 max rows allowed = 65,536)

This will download a spreadsheet with all of the data you have requested. Excel then allows you to for easily sort and compile data.



	A	B	C	D	E	F
1	Date of Contact	Partner Organization Affiliation	Session Conducted By	Field 1	Field 2	Field 3
2	01/08/2019	Western	Jeanne Murray	59	188	
3	01/25/2019	Midlands	Ann Kroeger	100	0	
4	01/28/2019	Nebraska SHIP	Carol Harrah	180	0	
5	01/07/2019	West Central	Rhonda Godbey			4900
6	01/22/2019	Western	Caryn Long			4900
7	01/10/2019	Western	Caryn Long	190	147	
8	01/17/2019	West Central	Rhonda Godbey	1679.26	231	
9	01/22/2019	Northeast	Karen Ritter	1681.35	165	
10	01/09/2019	Midlands	Cecelia Grotz	1708	869	
11	01/07/2019	Nebraska SHIP	Jonathan Burlison	1711	231	
12	01/17/2019	Nebraska SHIP	Brenda Motis	195	36	
13	01/18/2019	Nebraska SHIP	NE SHIIPB	211	198	
14	01/07/2019	Midlands	Cecelia Grotz	214	42	
15	01/24/2019	Nebraska SHIP	Jonathan Burlison	220	209	
16	01/28/2019	Nebraska SHIP	Linda Maly	253	0	
17	01/25/2019	Western	Caryn Long	262	180	
18	01/16/2019	Midlands	Ann Kroeger	297	130	
19	01/10/2019	Western	Caryn Long	298	165	
20	01/24/2019	Nebraska SHIP	Jen Coon	307.2	180	

# Tracking Savings

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**WARNING!** The raw data does contain mistakes

- Missing one of the Part D numbers
- Miskey a number
- Confirmation numbers entered into one of these fields

Important that you thoroughly review the data!



Monthly Savings Per Region

Agency	Month	Part D	Other	Total Saved
BR	Oct	\$84,348.37	\$40,994.00	\$125,342.37
Lincoln	Oct	\$981,601.80	\$86,761.00	\$1,068,362.80
Midlands	Oct	\$329,990.00	\$339,557.00	\$669,547.00
NEAAA	Oct	\$813,440.40	\$29,850.00	\$843,290.40
SCAAA	Oct	\$225,245.60	\$68,933.00	\$294,178.60
VAS	Oct	\$496,140.50	\$116,225.50	\$612,366.00
WCAAA	Oct	\$1,036,792.00	\$25,061.00	\$1,061,853.00
Western	Oct	\$248,334.20	\$116,667.00	\$365,001.20
	<b>Total</b>	<b>\$4,215,892.87</b>	<b>\$824,048.50</b>	<b>\$5,039,941.37</b>

Agency	Month	Part D	Other	Total Saved
BR	Nov	\$145,422.76	\$37,515.00	\$182,937.76
Lincoln	Nov	\$3,192,277.00	\$170,096.60	\$3,362,373.60
Midlands	Nov	\$1,392,205.00	\$290,846.00	\$1,683,051.00
NEAAA	Nov	\$1,578,026.00	\$5,500.00	\$1,583,526.00
SCAAA	Nov	\$966,902.40	\$21,936.00	\$988,838.40
VAS	Nov	\$1,270,969.00	\$104,164.00	\$1,375,133.00
WCAAA	Nov	\$662,324.30	\$4,900.00	\$667,224.30
Western	Nov	\$713,490.70	\$108,093.00	\$821,583.70
	<b>Total</b>	<b>\$9,921,617.16</b>	<b>\$743,050.60</b>	<b>\$10,664,667.76</b>

Agency	Month	Part D	Other	Total Saved
BR	Dec	\$229,436.24	\$12,587.00	\$242,023.24
Lincoln	Dec	\$970,123.30	\$57,980.20	\$1,028,103.50
Midlands	Dec	\$211,916.00	\$374,455.00	\$586,371.00
NEAAA	Dec	\$557,060.00	\$4,900.00	\$561,960.00
SCAAA	Dec	\$229,457.00	\$49,873.00	\$279,330.00
VAS	Dec	\$594,229.40	\$34,300.00	\$628,529.40
WCAAA	Dec	\$188,758.30	\$5,461.00	\$194,219.30
Western	Dec	\$425,170.40	\$67,463.00	\$492,633.40
	<b>Total</b>	<b>\$3,406,150.64</b>	<b>\$607,019.20</b>	<b>\$4,013,169.84</b>

## Annual Savings Per Region

Agency	Month	Part D	Other	Total Saved
BR	Year	\$463,538.37	\$287,711.00	\$751,249
Lincoln	Year	\$6,131,723.60	\$1,153,240.40	\$7,267,240
Midlands	Year	\$2,266,285.00	\$2,147,459.00	\$4,192,956
NEAAA	Year	\$3,144,890.18	\$190,950.00	\$3,338,570
SCAAA	Year	\$1,834,091.00	\$405,813.00	\$2,239,904
VAS	Year	\$2,585,741.45	\$633,897.50	\$3,219,639
WCAAA	Year	\$2,003,618.84	\$130,084.00	\$2,138,603
Western	Year	\$2,087,889.10	\$661,322.00	\$2,739,411
	<b>Total</b>	<b>\$20,517,777.54</b>	<b>\$5,610,476.90</b>	<b>\$25,887,572</b>

# Volunteer Letters Sent Post AEP

NEBRASKA

Good Life. Great Opportunity.

DEPARTMENT OF INSURANCE



Pete Ricketts, Governor

February 20, 2019



Dear Barbara,

I would like to thank you for your hard work and dedication to the Nebraska SHIIP program in 2018. Your efforts made a big impact on your community. Between June and December, 2018 you assisted 374 clients, helping them save \$185,200.

Overall, the Nebraska SHIIP had a great year. As a program we assisted over 29,000 clients (and we continue to get contact forms in everyday) and hosted over 1,200 outreach and media events. As a group, we helped Nebraskans save over \$17,000,000.

Because Medicare is so confusing, having a resource that provides completely free and unbiased assistance is priceless. Nebraska's Medicare beneficiaries are very fortunate to have such dedicated individuals working for them.

Thank you again, I truly appreciate everything you have done for our program.

Sincerely,

Alicia Jones  
Nebraska SHIIP Director

NEBRASKA

Good Life. Great Opportunity.

DEPARTMENT OF INSURANCE



Pete Ricketts, Governor

February 20, 2019



Dear Bill,

I would like to thank you for your hard work and dedication to the Nebraska SHIIP program in 2018. Your efforts made a big impact on your community. Between June and December, 2018 you assisted 49 clients, helping them save \$27,435.

Overall, the Nebraska SHIIP had a great year. As a program we assisted over 29,000 clients (and we continue to get contact forms in everyday) and hosted over 1,200 outreach and media events. As a group, we helped Nebraskans save over \$17,000,000.

Because Medicare is so confusing, having a resource that provides completely free and unbiased assistance is priceless. Nebraska's Medicare beneficiaries are very fortunate to have such dedicated individuals working for them.

Thank you again, I truly appreciate everything you have done for our program.

Sincerely,

Alicia Jones  
Nebraska SHIIP Director

# Volunteer Letters Sent for Grant Year

## Grant Year 2018

Volunteer Name: <b>Barbara Caron</b> <i>Lincoln Region</i> CSR Number: [REDACTED]	Data for June 2018 – March 2019 <i>Entered as of 4/30/19</i>
Address on file: 7100 Holmes Park Road Lincoln, NE 68506	Part D Savings: \$185,143 Other Savings: \$0 Total Savings: \$185,143
Email on file: bcaron3@gmail.com	Total Client Contacts: 388
Phone on file: 402-540-7819	Total Time Spent: 11,655 minutes

### Stars Reporting Tool

Use this website to report your SHIIP related client contacts and outreach data.

<https://smpship.acl.gov>

Username: \_\_\_\_\_ Password: \_\_\_\_\_

### Volunteer Portal

Use this website to access SHIIP resources like the Counselor Manual, PowerPoint presentations, forms, past Webinar recordings and many other resources.

<https://nebraska.csod.com>

Username: bcaron3@gmail.com Password: \_\_\_\_\_

### Medicare Supplement Compare Tool

Use this website to run Medicare Supplement quotes for our clients.

<https://www.insurancetoolsportal.com/nedoi/auth/signin>

Username: lincoln@login.com Password: csg2019

### SHIPTA Center

Use this website to take your initial volunteer training and access trainings on specific topics.

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

Username: \_\_\_\_\_ Password: \_\_\_\_\_

### Other:

Username: \_\_\_\_\_ Password: \_\_\_\_\_

## Grant Year 2018

Volunteer Name: <b>Bill Beard</b> <i>Lincoln Region</i> CSR Number: [REDACTED]	Data for June 2018 – March 2019 <i>Entered as of 4/30/19</i>
Address on file: 1100 N 69th St Lincoln, NE 68505	Part D Savings: \$27,789 Other Savings: \$0 Total Savings: \$27,789
Email on file: wbeard1946@gmail.com	Total Client Contacts: 53
Phone on file: 402-325-9009	Total Time Spent: 1,495 minutes

### Stars Reporting Tool

Use this website to report your SHIIP related client contacts and outreach data.

<https://smpship.acl.gov> |

Username: \_\_\_\_\_ Password: \_\_\_\_\_

### Volunteer Portal

Use this website to access SHIIP resources like the Counselor Manual, PowerPoint presentations, forms, past Webinar recordings and many other resources.

<https://nebraska.csod.com>

Username: wbeard1946@gmail.com Password: \_\_\_\_\_

### Medicare Supplement Compare Tool

Use this website to run Medicare Supplement quotes for our clients.

<https://www.insurancetoolsportal.com/nedoi/auth/signin>

Username: lincoln@login.com Password: csg2019

### SHIPTA Center

Use this website to take your initial volunteer training and access trainings on specific topics.

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

Username: \_\_\_\_\_ Password: \_\_\_\_\_

### Other:

Username: \_\_\_\_\_ Password: \_\_\_\_\_

# DO YOU COMPARE?

Medicare Part D Open Enrollment  
*October 15 - December 7*



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Last year the Nebraska SHIP helped  
Nebraskans **save over \$14 MILLION**  
by comparing Part D plans.

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**Call 1-800-234-7119**

to schedule your Part D comparison.