

BEST PRACTICES FOR MEDICARE OUTREACH & ASSISTANCE

Best Practices for Medicare outreach and assistance in Wisconsin have been developed over the years based on the experiences of benefit specialists and other staff at agencies around the state. These practices are divided into four categories: staffing, community partnerships, outreach directly to beneficiaries, training, and some reporting resources.

STAFFING

Ensure adequate time devoted to Medicare outreach activities. Consider use of volunteers to assist with outreach or to help with other work, freeing up time for the Benefit Specialist to devote to outreach activities.

- Provide regular Benefit Specialist office hours in outlying and rural areas.
- Dedicate adequate staff hours to outreach and assistance activities to ensure availability throughout your geographic service area.
- Use volunteers to assist with various activities such as Part D sessions & outreach.

COMMUNITY PARTNERSHIPS

Build partnerships with other professionals and agencies in your community who serve your target audience. Educate them about low-income assistance (MSP & LIS), as well as Medicare preventive benefits, and provide them with resources to share with their clients. Explain where and when to make referrals. Seek opportunities for presentations, enrollment events or other outreach activities at their scheduled events.

Important community partners include:

- **Local Social Security Office** - Encourage them to refer their clients to Aging and Disability Resource Center (ADRC) and/or Aging Unit staff for assistance. Explain the EBS role in assisting people to complete applications as well as screening them for other benefit programs.
- **Pharmacies** - Provide resources and educate pharmacy staff about MSP, LIS, & SeniorCare programs and where and when to refer customers.
- **Libraries** - Connect with reference librarians. Offer to do presentations.
- **Churches and Interfaith Programs** – Talk with the administrative assistant or pastor.
- **Hospitals and Clinics** - Talk to social services and/or financial service staff.
- **Income Maintenance Staff** - Educate about MSP/LIS/SeniorCare programs since they work with LIHEAP, Homestead Tax Credit and FoodShare.

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Navigating Medicare

- **AARP / VITA Tax Aides** - Educate about MSP/LIS/SeniorCare programs so they can screen for and make referrals.
- **Food Pantries** (also Stockbox and Farmers Market Voucher programs) -Provide resources and educate staff on MSP/LIS/SeniorCare programs.
- **Veterans Administration/Local Veteran Service Officer (VSO)** - Share info about Medicare related programs and resources.
- **Employer Outreach** - Meet with and educate HR staff, offer presentation, resources.
- **Minority Community Groups** - Connect 1:1 with local leaders of Hispanic, Hmong or other minority community groups - provide outreach materials, educate staff.
- **Community Organizations** - Lion's Club, Kiwanis, Rotary, Women's clubs.
- **Senior Housing** - establish relationship with housing manager for referrals, etc.
- **Public Health** - offer outreach at blood pressure clinic, flu shot clinic.
- **Senior Medicare Patrol (SMP)** - connect with volunteers in your area, educate about Medicare related programs, provide resources, and seek opportunities to collaborate.

OUTREACH DIRECTLY TO BENEFICIARIES

Use a wide range of outreach techniques to ensure you are reaching the maximum number of people. Connect with Medicare beneficiaries through presentations, office or home visits, vendor booths, marketing materials, advertising via radio, television, newspapers, etc.

- Hold regular "Welcome to Medicare" presentations so that new beneficiaries are reached right away. Schedule presentations in advance and at various times and locations, so your community partners know where and when they can send new clients.
- Utilize volunteers to help with outreach, open enrollment, or other SHIP activities. *Use "Welcome to Medicare" trainings to seek out potential SHIP volunteers.*
- Offer a variety of presentations on all Medicare related programs (LIS/MSP/SeniorCare, Part D, health promotion activities and preventive benefits) in various locations and to various groups throughout the county.

Some examples are:

- Senior Dining Sites
- Senior Housing Complexes
- Rotary Meetings (or other service organizations)
- Senior Clubs
- Board of Directors meetings – ADRC, Aging, County, etc.

- Other community partners listed above
- Create a marketing plan specific to low-income assistance programs and preventive benefits, include specific type of outreach and completion date.

Examples include:

- Advertisements on radio, TV, and newspapers
- Radio talk shows
- Send flyer with Home Delivered Meals
- Hang flyers at grocery stores/convenience stores
- Send inserts with senior nutrition “bill”
- Submit articles in newsletters – your agency and partner agencies
- Mail flyers to senior contact list
- Mail Open Enrollment Period reminder postcards to previous OEP clients
- Attend Health Fairs, Senior Expos and other Resource Fairs – bring handouts and be available to answer questions
- Be available at Community Free Meals to explain programs and answer questions
- Promote “word of mouth” outreach by asking satisfied clients to share information with neighbors and friends.

TRAINING

Offer training for your colleagues and community partners, so they understand the programs, know how and when to make referrals, and are aware of upcoming community outreach events. Regular training should be provided to ensure new staff are trained, as well as to stress the importance of low-income assistance and Medicare preventive benefits.

- Regularly educate all ADRC and Aging Unit staff who work with customers. If possible, attend staff meetings regularly for the following:
 - Information & Assistance (I&A) Specialists
 - Disability and Elder Benefit Specialists (DBS and EBS)
 - Nutrition Site Managers - Explain the programs, publicize upcoming events, and share resources to pass along to their diners, as well as home-delivered meal volunteers.
 - Health Promotion/Prevention Coordinators – Learn about their programs and collaborate on outreach efforts.
- Regularly attend Income Maintenance staff meetings to explain programs, advertise upcoming outreach events and discuss proper referrals.
- Provide ongoing training to community partners about MSP/LIS/SeniorCare programs and when and where to make referrals.
- Attend coalition meetings (e.g., I-Team, Caregiver, Senior Concerns Consortium) to continue to expand community partnerships.

REPORTING

Reporting on outreach is essential to show all the work you are doing to reach Medicare beneficiaries in your community. Please reach out with any questions you may have about reporting to help show this valuable work.

- Report through one of these ways depending on your agency's reporting structure:
 - [SharePoint WellSky/SAMS page for Benefit Specialists](#)
 - [WellSky/SAMS Training Materials for Benefit Specialists](#)
 - SHIP TA Center's [STARS](#) Page
- Reporting Resources:
 - [SHIP Reporting Instructions \(P-03179\)](#)
 - [MIPPA Reporting Instructions \(P-03087\)](#)
- Reporting Contacts:
 - *Please direct questions about **SHIP reporting** to:*
 - **Michelle Grochocinski**, Wisconsin SHIP Director
michelle.grochocinski@dhs.wisconsin.gov
 - *Please send questions about **MIPPA** to:*
 - **Pamela Watson**, MIPPA Grant Program Coordinator
pamela.watson@dhs.wisconsin.gov
 - *For assistance **navigating WellSky** contact:*
 - Doug Holmes 608-261-5989
douglas.holmes@dhs.wisconsin.gov

**For assistance with Medicare outreach please reach out to the GWAAR
Medicare Outreach Coordinator:**

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**To view all the GWAAR Medicare Outreach and Assistance Resources, follow the link to
our webpage:**

<https://gwaar.org/medicare-outreach-and-assistance-resources>