**Medicare Outreach Idea of the Month**

January 2024

**Tax Preparers**

January is a great time to connect with your local income tax assistance sites before the upcoming tax season. The [IRS's Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs](https://www.irs.gov/individuals/free-tax-return-preparation-for-qualifying-taxpayers) offer free basic tax return preparation to qualified individuals. Volunteer income tax preparers are in a unique position to identify low-income Medicare beneficiaries who may be eligible for financial assistance with Medicare costs, and this provides another opportunity to share the message about programs that can help those in your community!

Visit the [VITA/TCE Locator](https://irs.treasury.gov/freetaxprep/) and the [AARP Foundation Tax-Aide Locator](https://na01.safelinks.protection.outlook.com/?url=http%3A%2F%2Flinks.govdelivery.com%3A80%2Ftrack%3Ftype%3Dclick%26enid%3DZWFzPTEmbWFpbGluZ2lkPTIwMTkwMTAyLjk5NjEyOTExJm1lc3NhZ2VpZD1NREItUFJELUJVTC0yMDE5MDEwMi45OTYxMjkxMSZkYXRhYmFzZWlkPTEwMDEmc2VyaWFsPTE3NDIyMDY3JmVtYWlsaWQ9ZGViYmllLmJpc3N3dXJtQGd3YWFyLm9yZyZ1c2VyaWQ9ZGViYmllLmJpc3N3dXJtQGd3YWFyLm9yZyZmbD0mZXh0cmE9TXVsdGl2YXJpYXRlSWQ9JiYm%26%26%26101%26%26%26https%3A%2F%2Fwww.aarp.org%2Ffindtaxhelp&data=02%7C01%7C%7C2f896f3a2e5e4cdef4b908d670c61a32%7C8e087664409d4c4ca6b47aa01020d6ea%7C0%7C0%7C636820393489919081&sdata=nW%2BND6faje%2BYV0c9LU4a%2FcgGZdZK2c%2Bs%2BlZev0It%2BBM%3D&reserved=0) to find the local contacts and locations in your area to outreach to. Educate these tax preparers about the low-income benefit programs: Medicare Savings Programs, Low Income Subsidy (Extra Help), and SeniorCare. Let them know the impact these programs can have on eligible Medicare beneficiaries they may be working with. See if there is an opportunity to present to a group of their volunteers at once to educate them about Medicare related programs and share your materials. Don’t forget to thank these volunteers for all their hard work and even make a plug for your own volunteer opportunities!

There are many different resources you could use on the [Medicare Outreach and Assistance Resources webpage](https://gwaar.org/medicare-outreach-and-assistance-resources). You could provide copies of the \*[Eligibility Quick Check](https://gwaar.org/api/cms/viewFile/id/2007233) customized with your local contact information, for use as a quick reference tool. This can help them identify those who are potentially eligible and refer them to your agency. You could provide them with [Brochures and/or Posters](https://gwaar.org/brochures-posters-for-outreach) to put out at the site. Otherwise, you may already have your own materials you use in your outreach, whatever gets the word out!

Reaching out to local tax preparers and [other community partners](https://gwaar.org/api/cms/viewFile/id/2005682) is a great way to spread the word about these important programs that make a significant difference in the lives of many people with Medicare.

*\*Note that the income limits are based on the 2023 federal poverty guidelines.  Once the 2024 federal poverty guidelines are released, the Eligibility Quick Check document will be revised and uploaded to the GWAAR website.*

By the [GWAAR Medicare Outreach Coordinator](mailto:Alyssa.Kulpa@gwaar.org)

**Upcoming optional SHIP Outreach Trainings next page…**

**2024 Optional SHIP Outreach trainings:**

**Medicare Outreach Basics**

* **Date:**Thursday, February 1, 2024, from 1–2 p.m.
* [Zoom link](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fus06web.zoom.us%2Fj%2F87497752637%3Fpwd%3DTMr916bUZmVBQ7xxiRAJAepCrCyv0z.1&data=05%7C01%7CAlyssa.Kulpa%40gwaar.org%7C63f8d5a521e346db908808dbf115f051%7C8e087664409d4c4ca6b47aa01020d6ea%7C0%7C0%7C638368849280835799%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=WyALUvA2wy1Hj8MBIzRjLdbLti%2BEJCwDGnI4ukbNl6I%3D&reserved=0); [Outlook event](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcontent.govdelivery.com%2Fattachments%2FWIDHS%2F2023%2F11%2F29%2Ffile_attachments%2F2699154%2FOptional%2520SHIP%2520Training%2520-%2520Basics%2520of%2520Medicare%2520Outreach%25202024.02.01%2520-%2520Outlook%2520event.ics&data=05%7C01%7CAlyssa.Kulpa%40gwaar.org%7C63f8d5a521e346db908808dbf115f051%7C8e087664409d4c4ca6b47aa01020d6ea%7C0%7C0%7C638368849280842247%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=N7XYZuqeqjDN0tgYqcPDFgBGjlQ9DVs3YoDkDXVGbI0%3D&reserved=0)
* **Intended audience**: New SHIP counselors and anyone who wants to share outreach strategies of their own
* **Agenda**: Basics of Medicare outreach and ways to organize your outreach for the year

**Partnerships and Professional SHIP Volunteers**

* **Date:**Thursday, April 4, 2024, from 1–2 p.m.
* [Zoom link](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fus06web.zoom.us%2Fj%2F82854233636%3Fpwd%3Df2Da5qCXR5ATs0RrxlOSKhc8Rji7pq.1&data=05%7C01%7CAlyssa.Kulpa%40gwaar.org%7C63f8d5a521e346db908808dbf115f051%7C8e087664409d4c4ca6b47aa01020d6ea%7C0%7C0%7C638368849280849660%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=4FKgIfwCz%2FvdNUXBA2QgTm5bTzEJJ%2F%2BNea9HkR%2Ff7Yc%3D&reserved=0); [Outlook event](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcontent.govdelivery.com%2Fattachments%2FWIDHS%2F2023%2F11%2F29%2Ffile_attachments%2F2699177%2FOptional%2520SHIP%2520Training%2520-%2520SHIP%2520Volunteer%2520Partnership%2520Training%25202024.04.04%2520-%2520Outlook%2520event.ics&data=05%7C01%7CAlyssa.Kulpa%40gwaar.org%7C63f8d5a521e346db908808dbf115f051%7C8e087664409d4c4ca6b47aa01020d6ea%7C0%7C0%7C638368849280856411%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=2ua8T2H2sCS9sMv77eUSznA2wxjkPraOo2sIpdgxlzs%3D&reserved=0)
* **Intended audience**: SHIP counselors and supervisors interested in expanding their partnerships and/or identifying when it is advantageous to invite partners to become SHIP volunteers
* **Objectives**
  + Identify how to maximize the impact of a partnership
  + Learn when and how to refer prospective professional SHIP volunteers
  + Review conflict of interest rules regarding professional partnerships

Please email [Alyssa Kulpa](mailto:Alyssa.Kulpa@gwaar.org), GWAAR Medicare outreach coordinator, at [alyssa.kulpa@gwaar.org](mailto:Alyssa.Kulpa@gwaar.org) with any questions.