



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Medicare Counseling and Outreach for Wisconsin Residents

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Grant Manager
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SHIP and MIPPA Counselor Orientation

Acknowledgements



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Welcome!

Medicare is confusing, and many people who come to us feel overwhelmed.

SHIP counselors help save people thousands of dollars and empower them to understand and access health care.

Thank you for dedicating your time and skills to helping people in your community understand and access their health care!

Agenda



Wisconsin Medicare Landscape



Wisconsin SHIP Network



Expectations for Training



Reporting

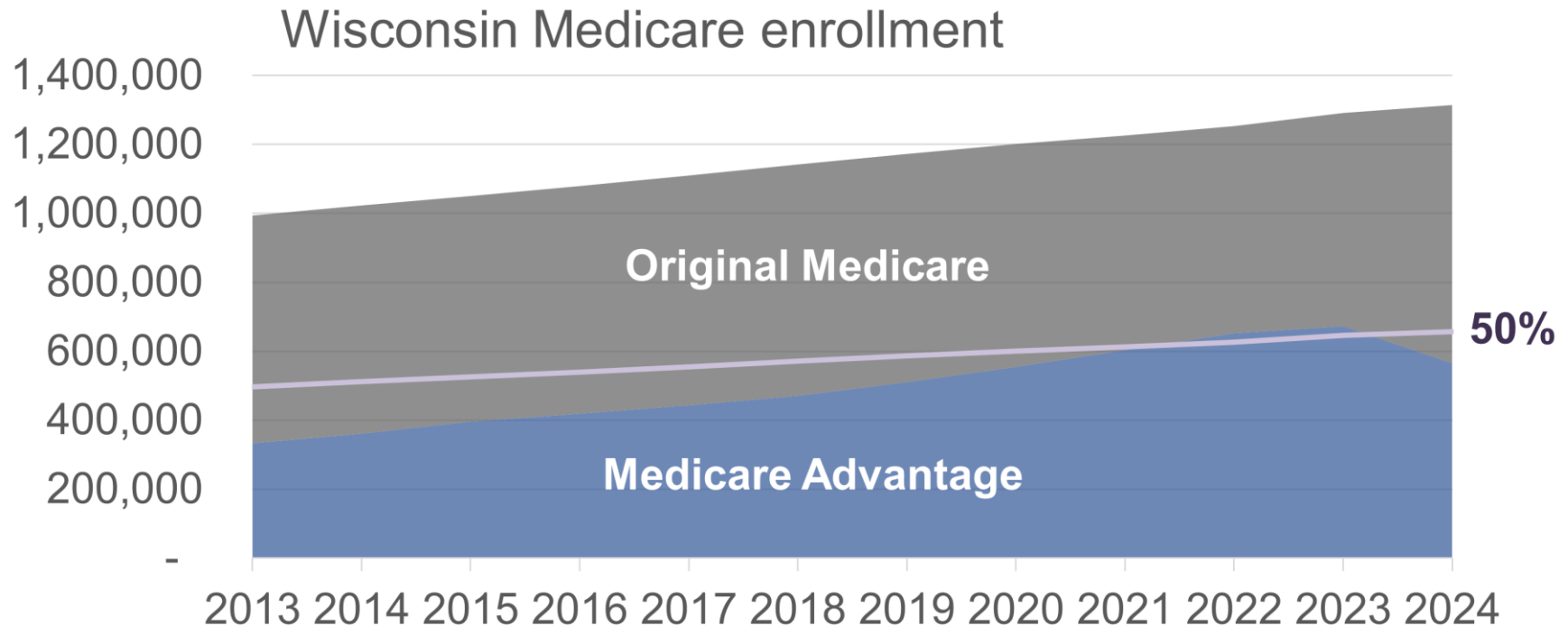


Resources

Wisconsin's Medicare Landscape

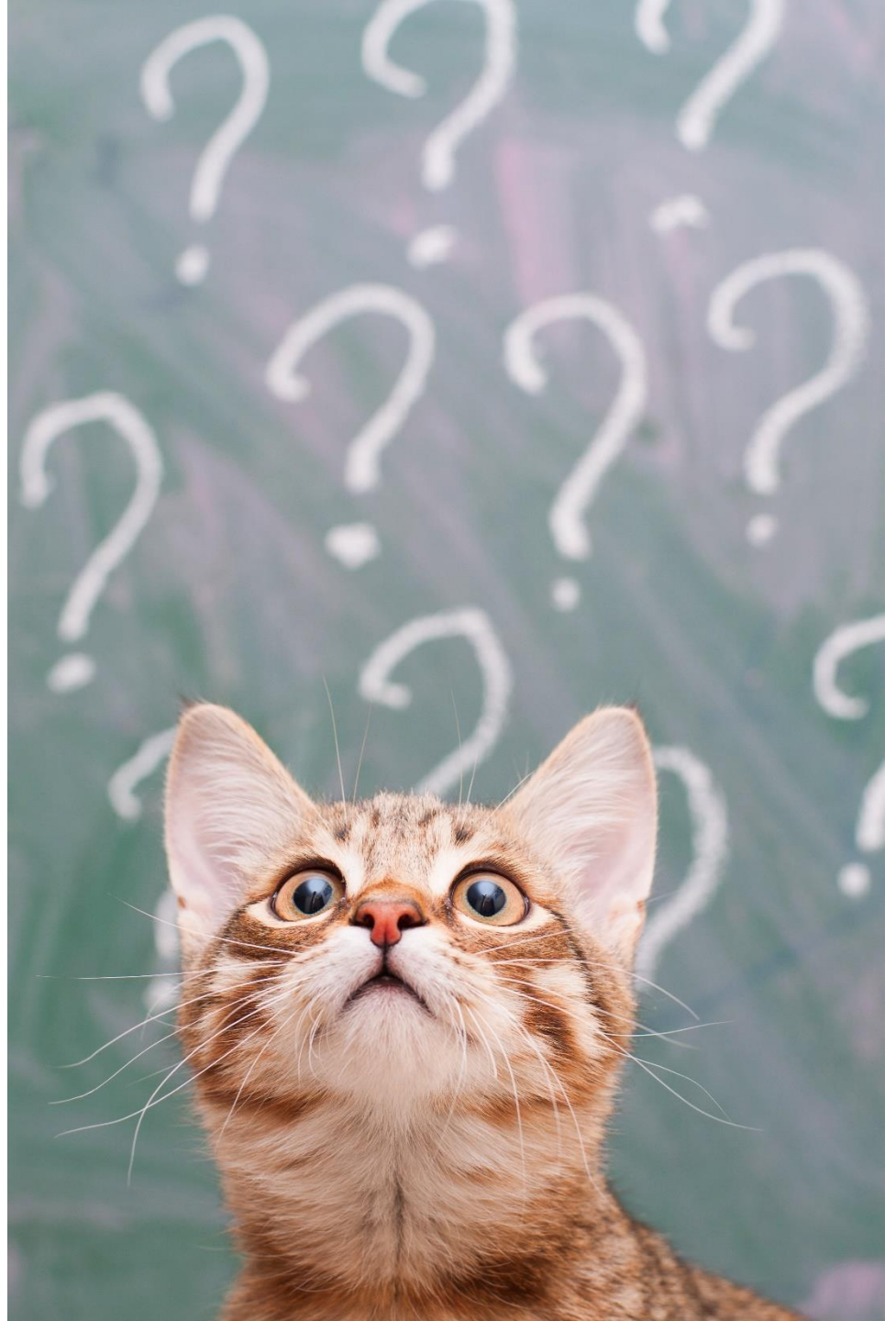
Medicare coverage options and the Wisconsin State Health Insurance Assistance Program (SHIP) Network

The number of Wisconsin Medicare beneficiaries increased 50% in 10 years.



- About 13% have Medicare due to a disability
- About 18% are low income and may qualify for financial assistance

Questions?



Wisconsin SHIP Network

Medicare counseling for Wisconsin residents

Programs to Help People Understand Medicare

The U.S. Administration for Community Living (ACL) provides two kinds of funding to states to help people with Medicare understand their options:

SHIP

State Health Insurance Assistance Program

MIPPA

Medicare Improvements for Patients and Providers Act

What is SHIP?

“SHIP is a national program that offers one-on-one assistance, counseling, and education to Medicare beneficiaries, their families, and caregivers to help them make informed decisions about their care and benefits.

SHIP services support people with limited incomes, Medicare beneficiaries under the age of 65 with disabilities, and individuals who are dually eligible for Medicare and Medicaid.”

- [Administration for Community Living](#)



Mission Statement

“The **SHIP mission** is to empower, educate, and assist Medicare-eligible individuals through objective outreach, counseling, and training.

The **SHIP vision** is to be the known and trusted community resource for Medicare information.”

- [Administration for Community Living](#)



SHIP Grant

- Wisconsin receives about \$1 million annually to support Medicare-related outreach, counseling, and enrollment assistance.
- The state tracks contacts with:
 - Individual beneficiaries and group outreach.
 - People with disabilities.
 - Low-income people.
 - Non-native English speakers.
 - Rural areas.
 - Enrollment assistance.



MIPPA Grant

- Wisconsin receives about \$730,000 per year to support supplemental outreach and application assistance for:
 - Medicare Part D Extra Help (LIS).
 - Medicare Savings Programs (MSP).
 - Medicare preventive benefits.
- Performance is measured by the number of contacts and outreach events on MIPPA topics.

SHIP Federal Partners

**Manages Medicare
enrollment and
premiums**



Administers Medicare



Administers SHIP



Wisconsin Partners: Statewide

1-800-242-1060

Medigap Helpline

1-855-677-2783

**Medigap Part D and Prescription
Drug Helpline**

For people aged 60 and older

1-262-347-3045

Video or
telephone

**Office for the Deaf and Hard of
Hearing**

dhs.wisconsin.gov/odhh/benefits.htm

Wisconsin Partners: Local

- Where are SHIP counselors?
 - County and Tribal aging offices
 - Aging and disability resource centers (ADRCs)
 - SeniorLAW in Milwaukee County
 - Dane County “focal points” (senior centers)
- More information is available on the [DHS Medicare Counseling webpage](#).

Wisconsin Partners: Local

Who are SHIP counselors?

- Medicare Helpline staff
- Disability and elder benefit specialists
- Tribal benefit specialists
- Case managers
- Clinic staff
- Volunteers

Comprehension Check

SHIP counselors are not paid by or affiliated with any private insurance companies.

a) True

b) False

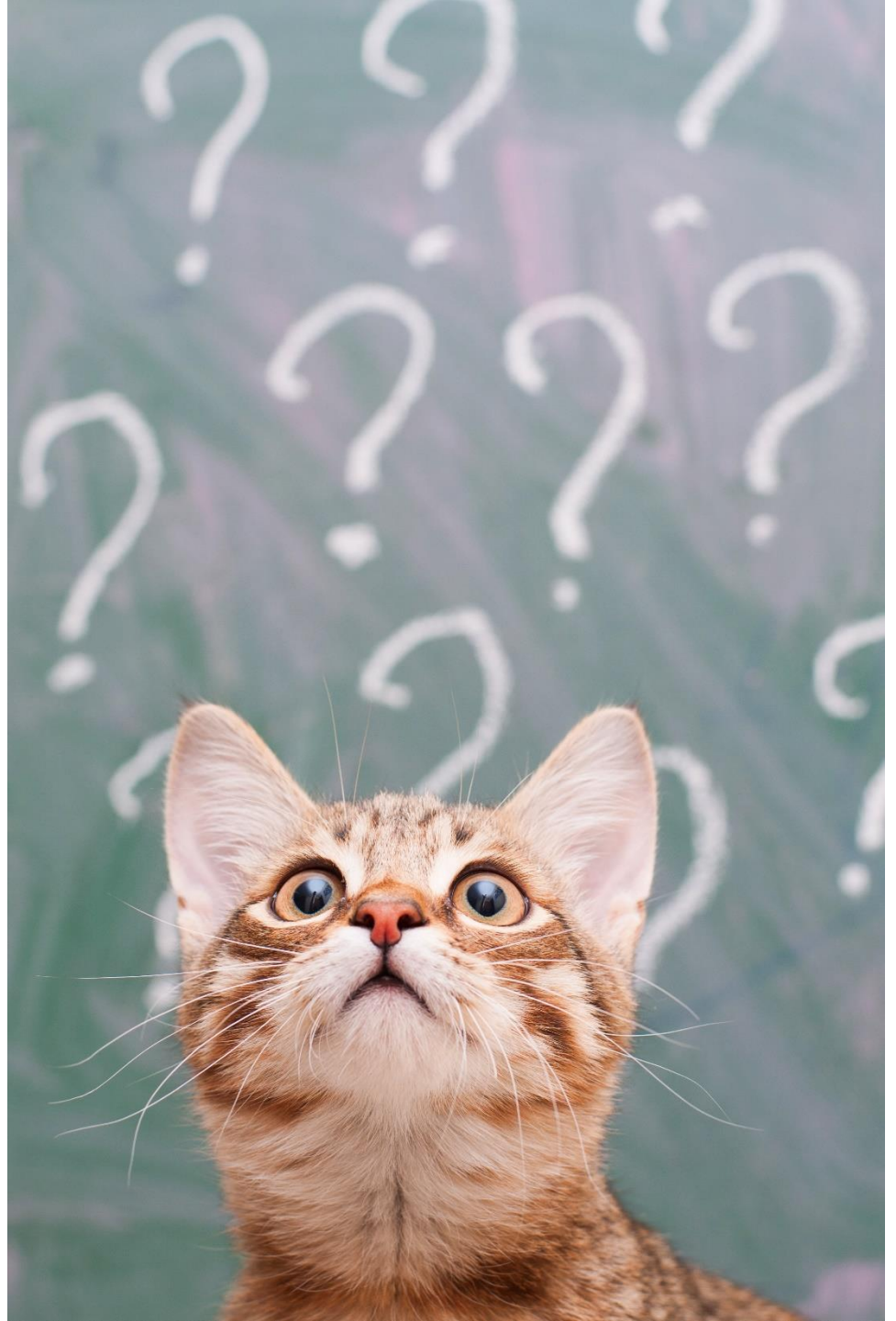


SHIP counselors tell people what Medicare plans to choose.

a) True

b) False

Questions?



What to Expect

Training and certification

Training Expectations

Medicare is complicated.

No one is expected to memorize everything. That's not possible!

What's important is that you know how to *find* the information you need.

Download the [Wisconsin SHIP Counselor Toolkit](#) from the [GWAAR Medicare Outreach and Assistance Resource webpage](#) right away to help you out.



Impact

SHIP counselors make a difference. They help save people thousands of dollars and help them access critical health care.

Counselors help people understand and compare plan options. Our clients often **save hundreds** or even thousands of dollars **each year!**

A counselor educated a client on options for getting a **medically necessary drug covered.**

A counselor helped someone appeal denial of air ambulance coverage. They got the **\$99,000 bill covered in full!**

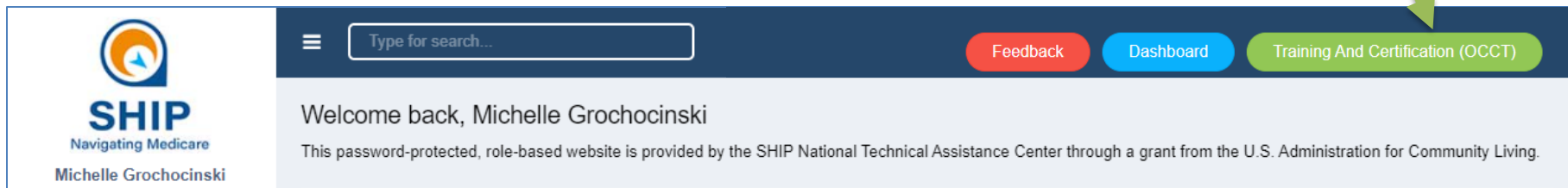
Certification

- SHIP counselors must be certified to provide one-on-one counseling or outreach.
- Certification levels
 - **Basic level:** Can help with new-to-Medicare appointments, Open Enrollment Period plan comparisons
 - **Advanced level:** Can help with complex topics including Medicaid and appeals

How to Get Certified

After you complete your Medicare training:

1. Log in to the SHIP Technical Assistance (TA) Center at shiphelp.org.
2. Click the green Training and Certification button.



3. Click Certification Tool.
4. Click Take Exam.

Email the SHIP director with issues.

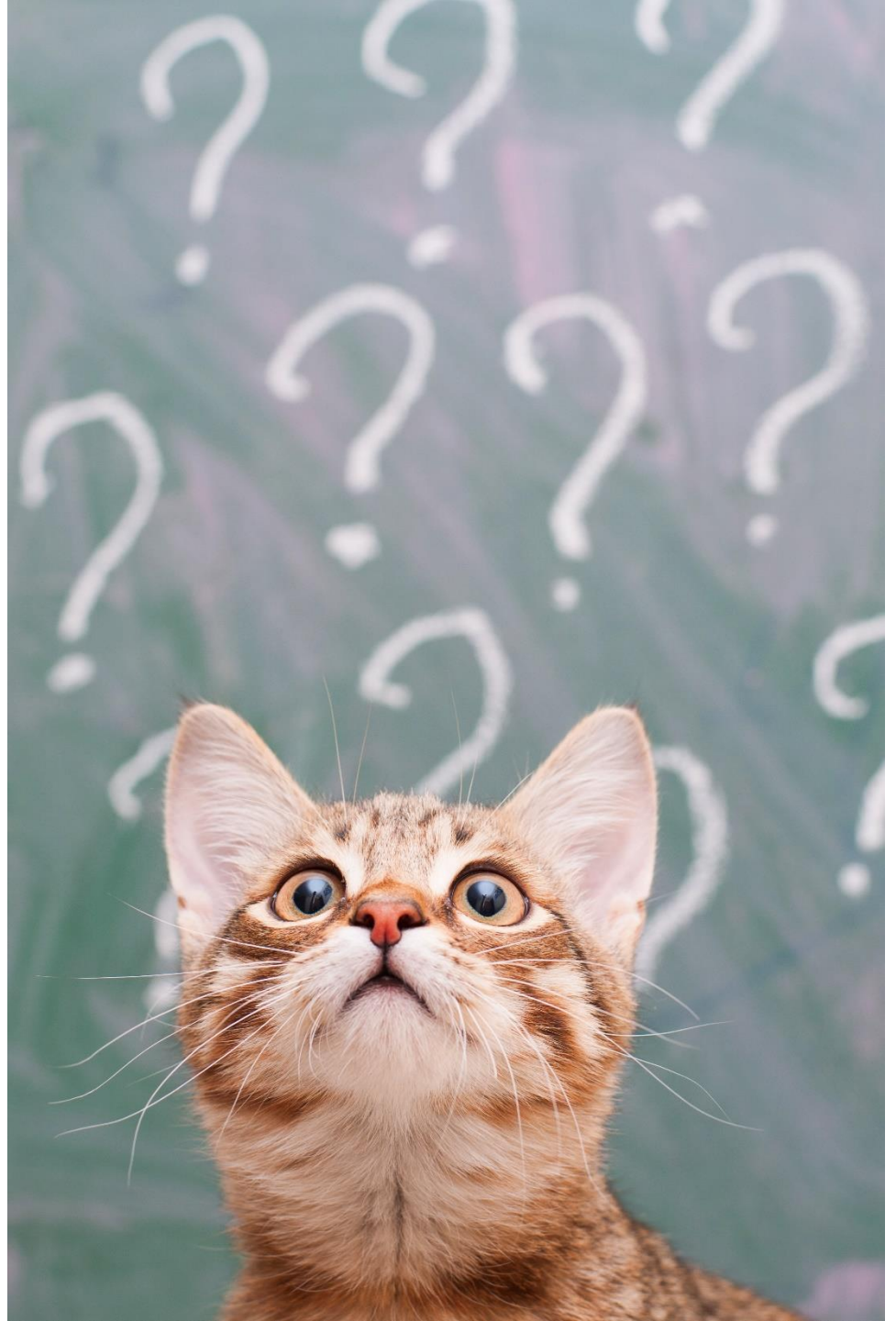
(michelle.grochocinski@dhs.wisconsin.gov).

Reminders

- ✓ Open book
([Wisconsin SHIP
Counselor Toolkit](#))
- ✓ No time limit
- ✓ 90% to pass
- ✓ Printable certificate
- ✓ One-and-done



Questions?



Reporting

Requirements and guidance

SHIP and MIPPA Grantee Reporting Requirements

All SHIP sites must report monthly on:

- Beneficiary contacts.
- Group outreach.
- Media outreach.

Data entry is due by the last day of the following month (for example, January data must be entered by February 28).

SHIP and MIPPA Grantee Reporting Requirements

■ Reporting

- Illustrates the impact of our work.
- Informs outreach strategies.
- Helps justify ongoing funding.



■ Follow the

[SHIP Reporting Instructions \(P-03179\)](#) and
[MIPPA Reporting Instructions \(P-03179\)](#).

Pro tip: save links to publications and forms.
They always lead to the most current copy!

Grantee Reporting Systems

Grant activities must be entered in the national [SHIP Tracking and Reporting System \(STARS\)](#).

- Dane County case managers fill out forms in an Excel format and submit them to Cindy Matulle (Matulle.Cindy@countyofdane.com) for entry into STARS.
- Medigap Helpline staff enter data into WellSky for export to STARS.
- Benefit specialists enter data into PeerPlace for export to STARS.

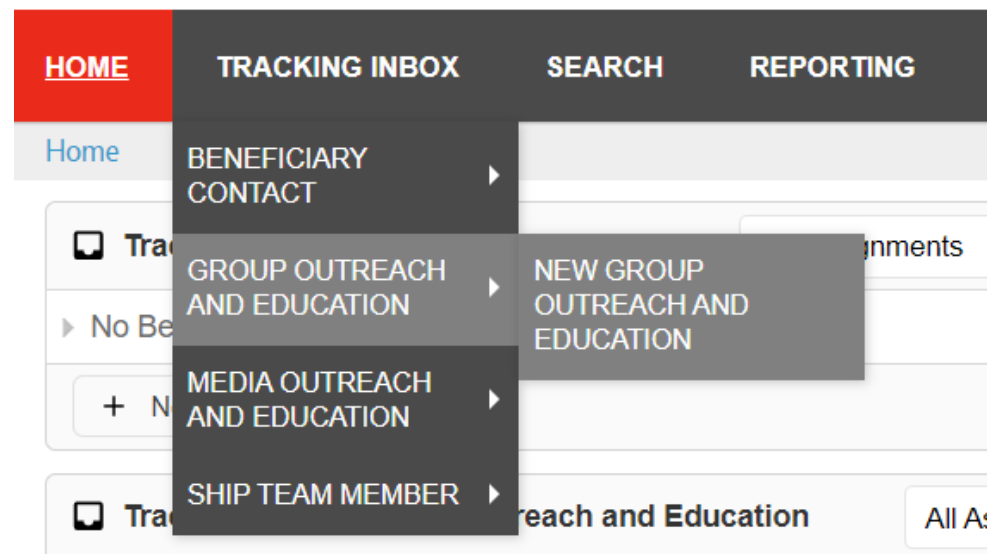
Reporting Beneficiary Contacts

Report all Medicare-related contacts with or about an individual Medicare beneficiary.

- Combine multiple same-day contacts with a client into one entry.
- Include phone calls, office appointments, home visits, letters, faxes, and email correspondence.
- Include time spent preparing documents, traveling and consulting with third parties.

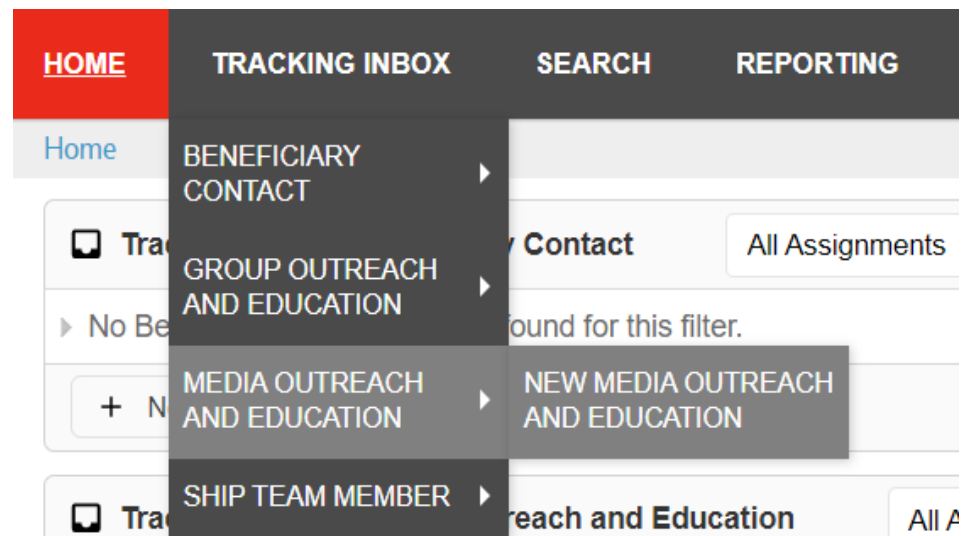
Reporting Group Outreach Activities

- Report activities where you share Medicare-related information with a group, such as:
 - Interactive presentations to the public.
 - Health fairs, booths, and exhibits.
 - Enrollment assistance events.
- Include preparation and travel time.



Reporting Media Outreach Activities

- Report activities where you share Medicare-related information through mass media, such as:
 - Newspaper articles and other print media.
 - Electronic media and public service announcements.
 - Radio interviews.
 - Television interviews.
- Include preparation and travel time.



MIPPA Reporting

Select MIPPA = “yes” on SHIP activity forms when assisting with MIPPA-grant related topics.

Open the [MIPPA Reporting Instructions \(P-03087\)](#) to see which topics count as MIPPA-related.

Generally, Medicaid, Medicare Savings Program, Extra Help, and Medicare preventive benefits count.

Statistical Data

- Detailed statistical reports on all activities are available in STARS.
- State-level program data is available on the [SHIP Fact Sheet \(P-00166\)](#) on the [Wisconsin Department of Health Services website](#).
- Email the Wisconsin SHIP and MIPPA Grant Manager (pamela.watson@dhs.wisconsin.gov) for help pulling data for your site.

Reporting Systems Access Issues

STARS

- Login credentials are issued by email.
- Email BoozAllenSTARSHelpDesk@bah.com with login issues.

PeerPlace

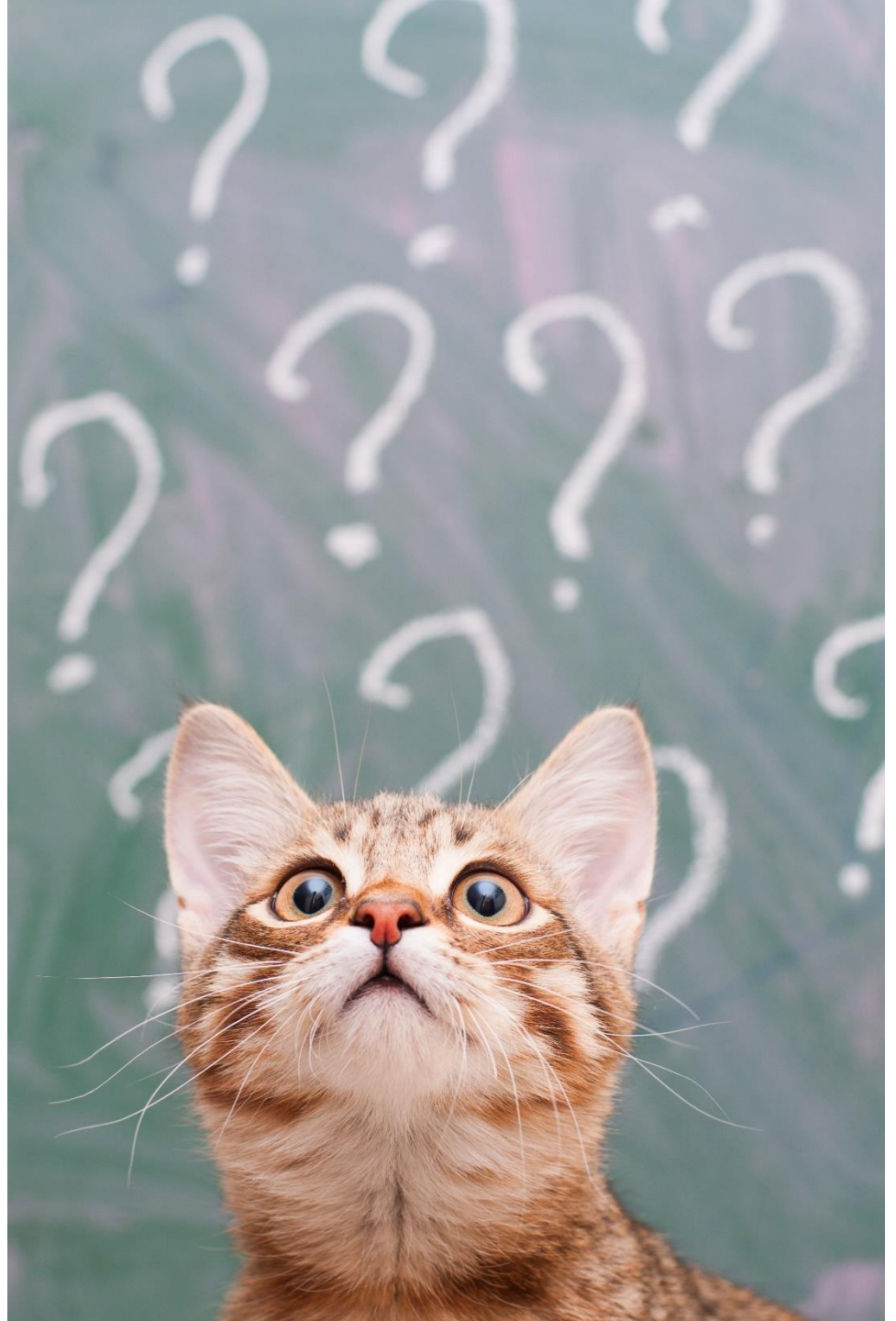
Email the Department of Health Services with login issues at DHSBADRTech@dhs.Wisconsin.gov.

Comprehension Check

Enter beneficiary contacts, group outreach, and media outreach into the SHIP Tracking and Reporting System (STARS):

- a) That same day.
- b) By the end of that month.
- c) By the end of the following month.
- d) By the end of the calendar year.

Questions?



Resources for SHIP Counselors

Technical assistance, contacts, and resources

SHIP National Technical Assistance (TA) Center

- Register:
 1. Go to the [SHIP TA Center website](#).
 2. Click on “SHIP Login” at the top of the homepage and follow the prompts to register for an account.
- Access Online Counselor Certification and Training (OCCT) courses and exams
- Access the resource library of webinars, consumer outreach materials, and more

GWAAR Medicare Outreach and Assistance Resources

- Find articles, posters, brochures, PowerPoint templates, and other materials designed for use in local outreach on the Medicare Outreach and Assistance Resources webpage at <https://gwaar.org/medicare-outreach-and-assistance-resources>.
- See the **Grantee Reporting Information** and **Tools for Professionals** sections for resources for counselors.
- Contact Medicare Outreach Coordinator Stephanie Haas for support with outreach: 608-219-1710, Stephanie.Haas@gwaar.org.

Complaint Tracking Module (CTM)

- A federal online system for reporting beneficiary problems with Medicare Advantage and Part D plans
- Accessible to:
 - Medigap Helpline supervisor
 - GWAAR Medicare Outreach Specialist

Centers for Medicare & Medicaid Services (CMS) Product Ordering

- Order free informational materials from [CMS](https://www.cms.gov).
- Preorder state-specific Medicare & You handbooks in bulk in the spring of each year (only one order per agency).



Medicare & You 2025

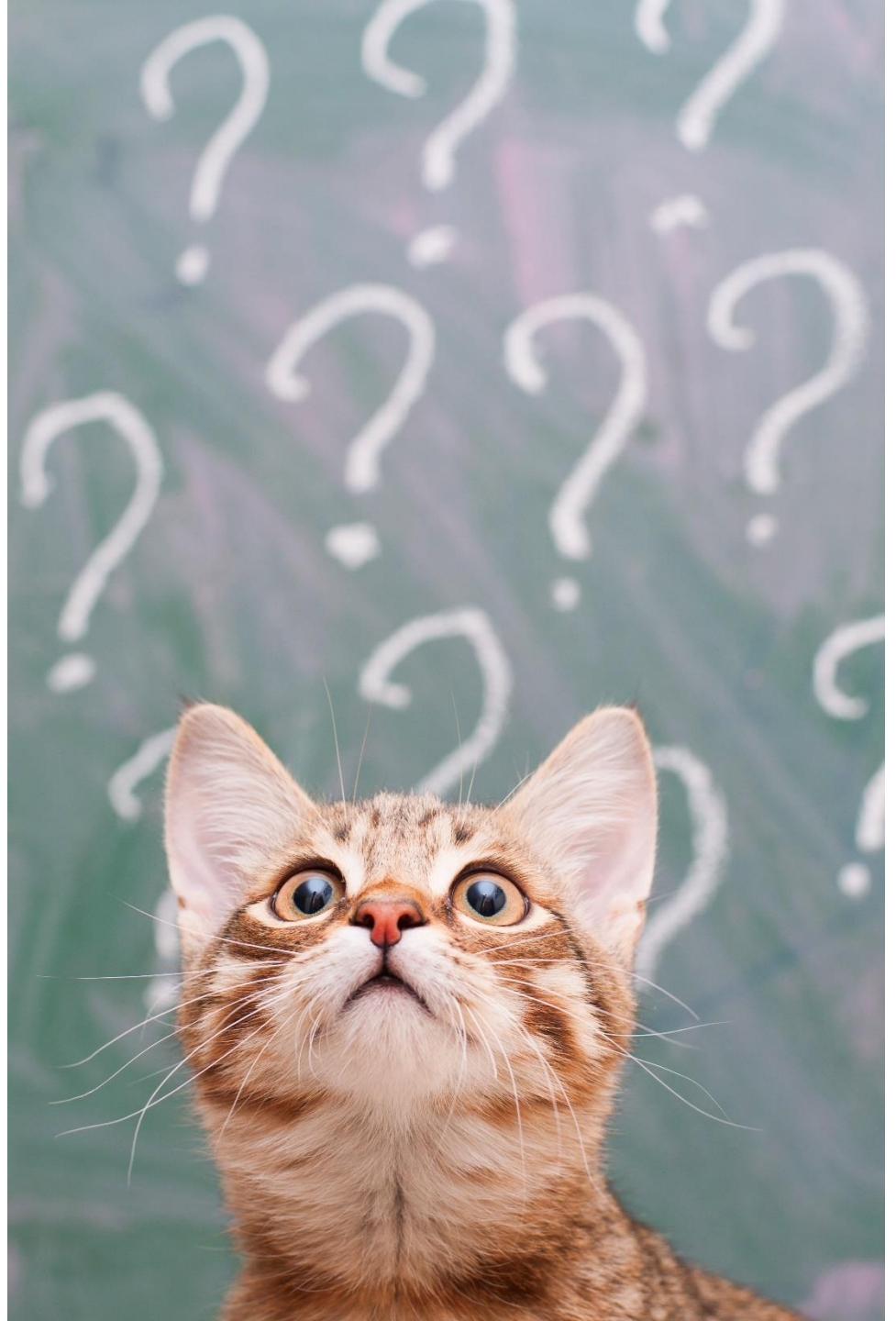
The official U.S. government
Medicare handbook



Additional Resources

- Medicare Updates for Wisconsin Professionals
 - Free webinars offered to all Wisconsin professionals every fall
 - Announcements sent via SHIP email listserv
 - Materials and recordings posted to GWAAR Open Enrollment Toolkit webpage at <https://gwaar.org/open-enrollment-toolkit>

Questions?



State Contact Information



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