

# Medicare Enrollment Events: Lessons Learned

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# Grant Disclaimer

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# Objectives

- Learn about Medicare enrollment events as a State Health Insurance Assistance Program (SHIP) option and model approach
- Learn best practices on designing your events based on advice from SHIPs in Wisconsin and nationwide
- Consider triaging options to manage increasing demand, particularly during the Open Enrollment Period (OEP)

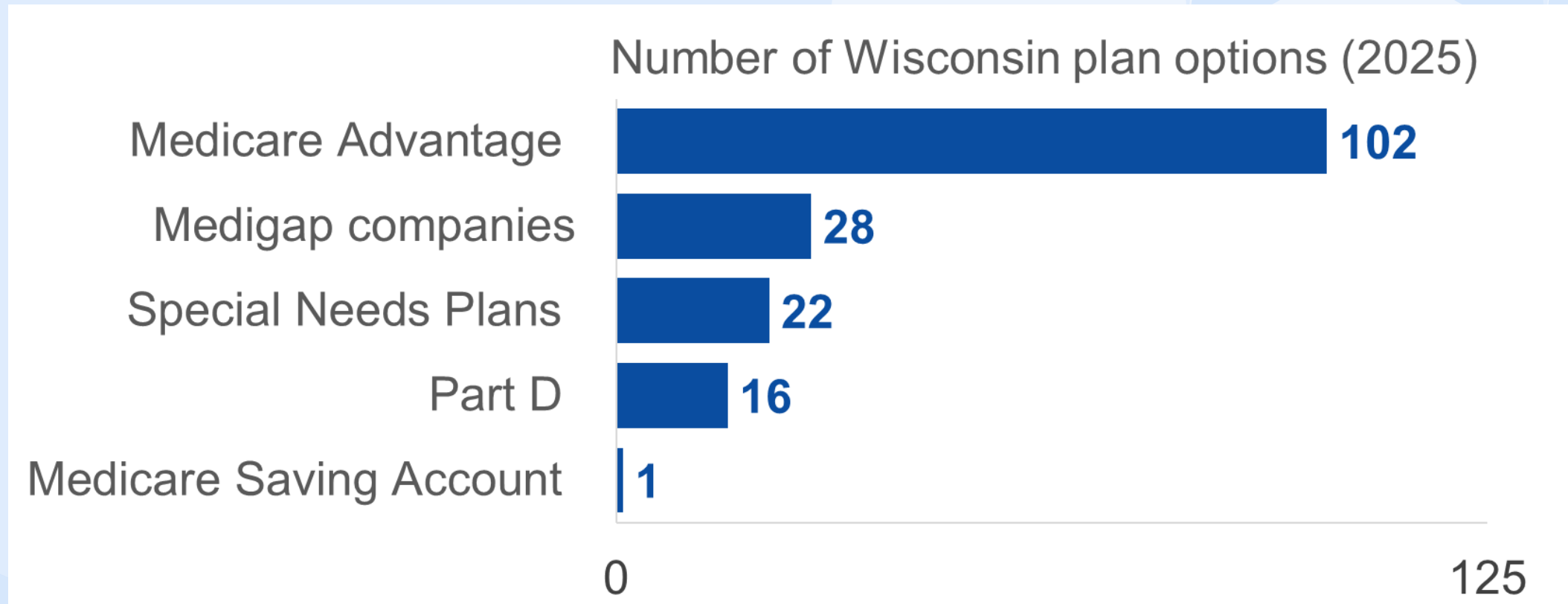
# Agenda

- Wisconsin context
- Enrollment events: Benefits
- Enrollment events: Barriers and considerations
- Lessons learned from the field
- Reporting guidance

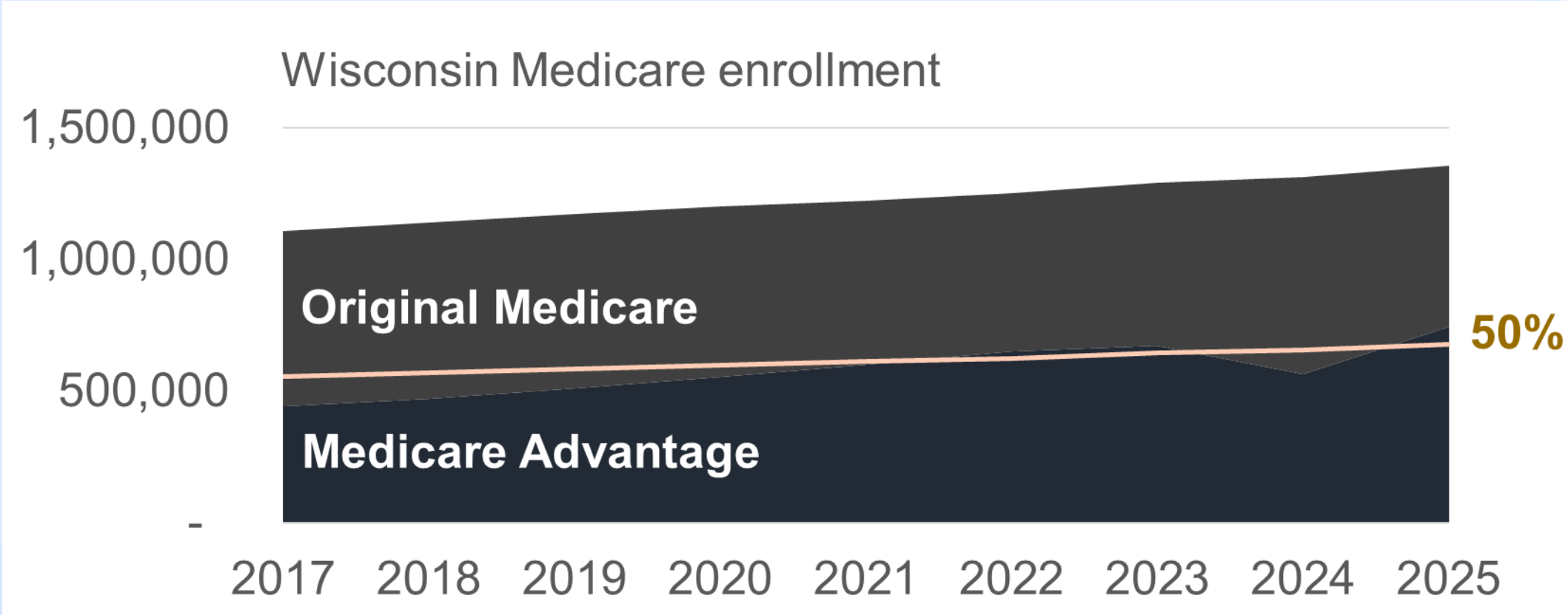
# Wisconsin Medicare Counseling Context

Why we're exploring expanding enrollment events as a service delivery model

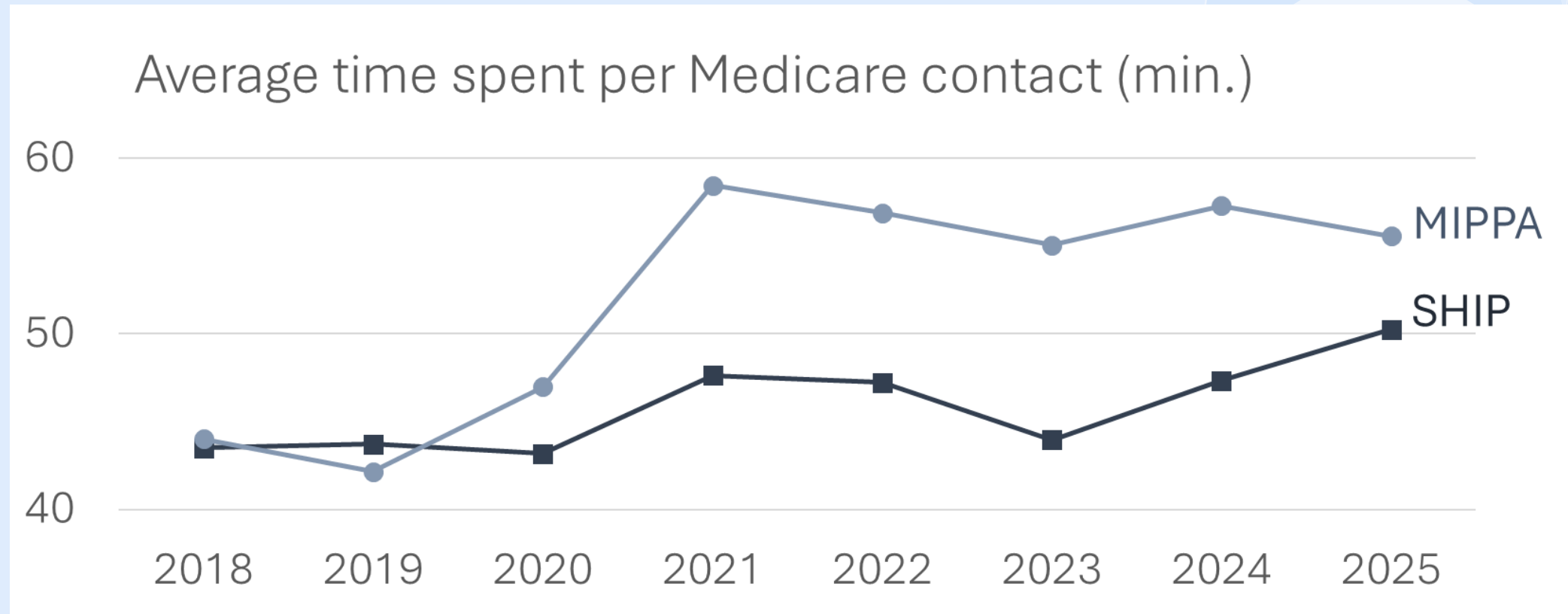
# Wisconsinites must choose between many complex Medicare plan options.



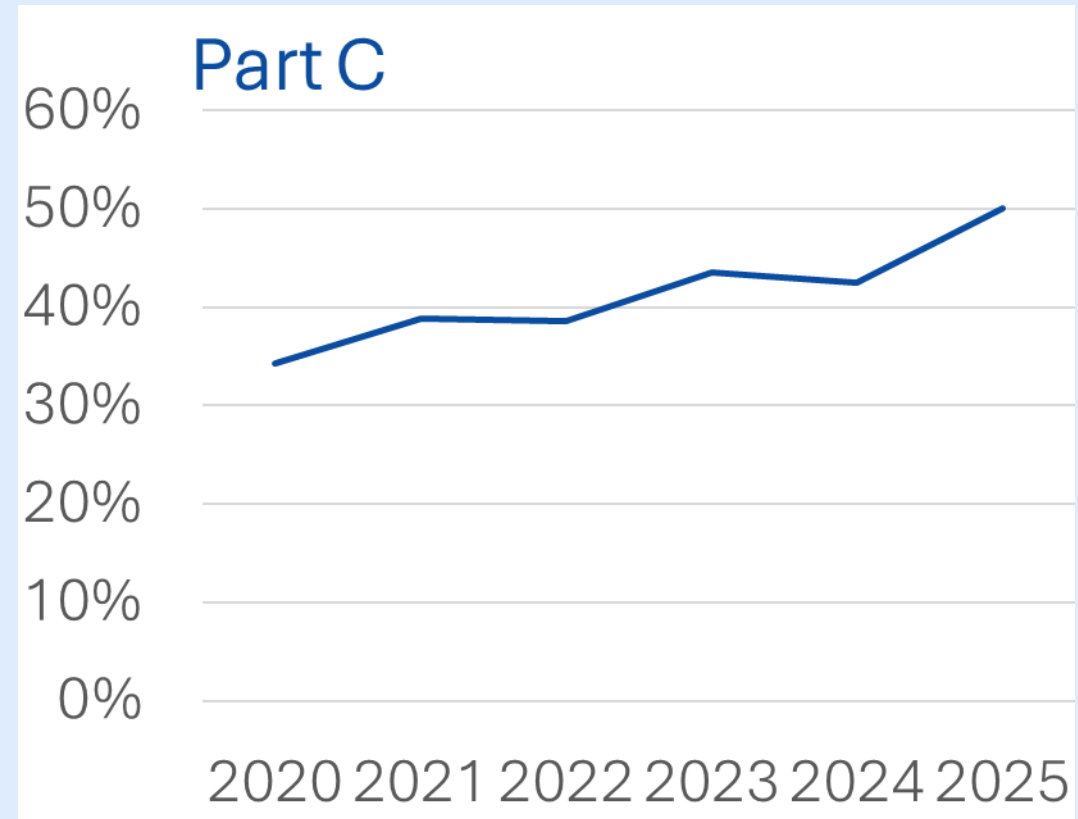
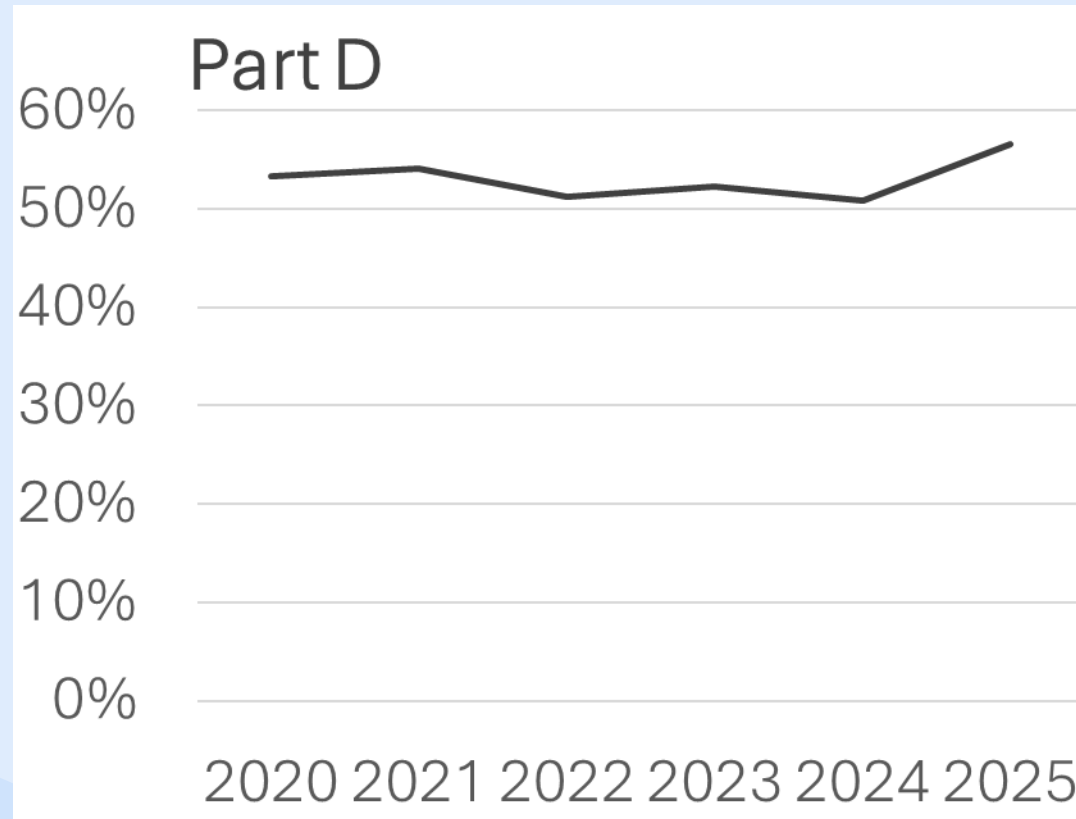
# The number of people with Medicare is rapidly increasing.



# The average time spent per individual counseling session is increasing.



# Over half of SHIP counseling sessions are about Part D or Part C (Medicare Advantage).



# Medicare.gov Login Changes Impede Mail Models

- Many SHIP agencies collect prescription information ahead of time, run plan comparisons, and mail the results to a customer prior to an OEP appointment.
- New Medicare.gov email requirements, multi-factor authentication requirements, and multiple login credential options makes this more challenging.
- If a customer doesn't have a Medicare.gov account, you need to run the comparison from scratch if there are any changes (for example, a missing medication).

Enrollment  
events may  
meet  
demand  
more  
efficiently.

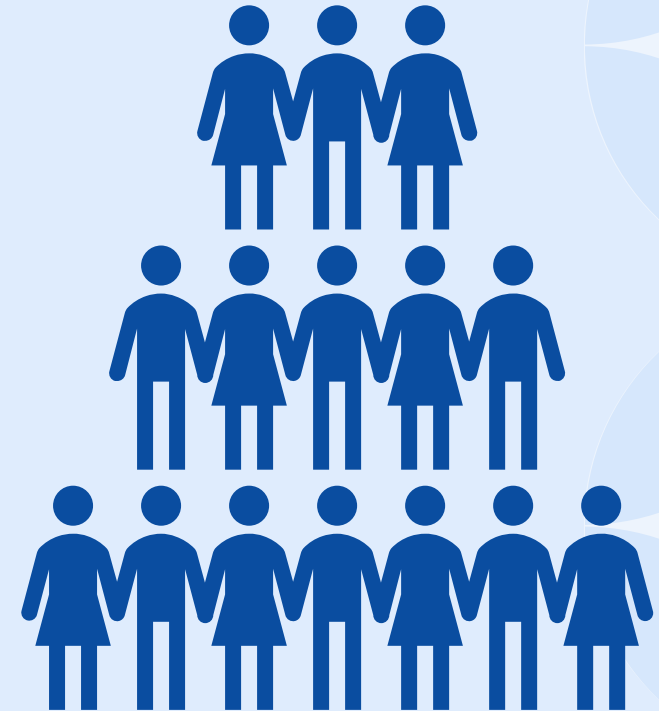


# Enrollment Event Defined

# Enrollment Event Definition

“This includes any type of program where enrollment is the key objective and where team members are on hand to help the beneficiary submit an application online or by paper. An enrollment event may be either solely sponsored by a SHIP or sponsored in partnership with another organization such as Social Security Administration (SSA) office.”

– [STARS Manual](#) (log in required),  
Chapter 5



# Benefits of Enrollment Events

# Enrollment Event Benefits



**Efficiency:** Help more people at once.  
Save time on reporting.



**Partnership:** Create connections with local venues to meet people where they are at; for example, schools and colleges, senior centers, computer labs, and libraries.



**Education:** Teach and empower attendees to complete Plan Finder comparisons themselves.

## Testimonies: Benefits

I had a specific seminar on how to use Plan Finder and pick your own drug plan. Eight people came [and gave] mostly positive comments.

We have consistently achieved strong results through intentional collaboration. By building partnerships with agencies that share a common interest in advancing service delivery to this specific target population, all parties can collectively drive greater impact and improve outcomes for those we serve.

# Considerations in Planning

Barriers and strategy

# Barriers



- Lack of access to computers or tablets
- Lack of technological literacy skills
- Lack of space to host a group



- Need for personal and/or complex counseling; for example, callers want to explore their own provider networks, their plan is ending, or they have limited English proficiency



- Medicare.gov account login challenges
- Lack of interest

## Testimonies: Barriers

Success depends on the volunteer help as well as people who show up's skills set.

Over 75% of the Medicare appointments...are for people who have no computer skills or would fall into the frail elder category.

Lack of capacity here was due to the Medicare Advantage plans leaving and changing networks, and she does not feel that a computer lab or group outreach would have helped...much for this specific group locally.

# Needs Assessment Questions

- Who is your audience? What is your community makeup?
- What types of one-on-one appointments are filling up most of your time? Would an (enrollment) event help with those topics?
- Do you have access to technology?
- Do you have space for a group?
- With what partner organizations do you have connections?



# Lessons Learned

Best practices shared by SHIP counselors from Wisconsin and across the nation

# Strategy

- **Assess** whether you or your audience have:
  - Access to technology.
  - Technological literacy.
  - Staff or volunteers to assist.
- **Communicate expectations clearly**, particularly regarding Medicare Advantage plans; for example, whether you will be discussing networks or extra benefits in detail.
- **Create a triaging plan.**
- Research what insurance events are available for plans that are nonrenewing.

# Triage Planning



# Triage Plan

1. Start Open Enrollment Period preparations in the summer.
2. Refer callers to 1-800-MEDICARE.
3. Refer to the Medigap Helpline, *if* they have capacity.
4. If appropriate, sign the person up for an enrollment event.
  - ✓ They can navigate technology independently.
  - ✓ They have a representative or you have personnel who can help them.
  - ✓ There is a computer or tablet available for them.
  - ✓ They can navigate to the enrollment event.
  - ✓ The event scope meets their needs.

# Triage Plan Continued

5. Sign them up for a one-on-one appointment.
  - If they have a standalone **Part D** plan, use the Open Enrollment Period: **October 15 – December 7**
  - If their plan is **nonrenewing**, use the Special Enrollment Period: **December 8 – February 28**
  - If they have a **Medicare Advantage** plan, use the Medicare Advantage Open Enrollment Period: **January 1 – March 31**
  - Use a **Special Enrollment Period** if they qualify

# Triage Plan Timeline

OEP prep				Part D		Non-renew	Medicare Advantage		
June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar

# Partnerships



# Lead With Value

## Instead of...

- "Can we use your space?"
- "Can we set up counseling at your facility?"

## Say...

- "We helped 200 people in your community save \$100,000 last year."
- "Last year, SHIP helped your patients reduce out-of-pocket costs and avoid coverage gaps. We'd like to partner to make those savings more accessible to your community."

# You Can Use the National SHIP Savings Statistics

SHIPs who helped with plan enrollment saved the average customer:

- \$2,046 in Part D (PDP) (2022)
- \$2,621 in Medicare Advantage (MA-PD) (2022)
- \$2,960 on average (2024)



Source: SHIP Tracking and Reporting System (STARS), Part D enrollment outcomes

## Testimonies: Partnerships and Tech

We partnered with a local organization that offered free laptops to eligible individuals. Together, we hosted two outreach events where we assisted with laptop distribution while also promoting benefit enrollment for consumers in need.

I had a specific seminar on how to use the Plan Finder and pick your own drug plan. It was held at [a local] senior center where they have 4 iPads people could use. They were encouraged to bring their own device.

# Best Practices



## Build In Extra Time

We had a decent turn out, but due to people's lack of computer skills and many of the volunteers who offered to help also lacked the computer skills and lacked knowledge of medications, so issues such as name brand verses generic or trying to put over the counter medications in...not inputting the information correctly.

The [benefit specialist] ended up doing a lot of 1 on 1 contacts at this event, and it went long due to those issues.

# Reporting

Guidelines and data entry instructions

# Enrollment Event vs. Individual Contact

- Report all attendees in the number of attendees/clients total when reporting the enrollment event; for example, “10 attendees.”
- Do not also or instead enter SHIP individual contacts (PeerPlace SHIP Units Entry Forms or STARS Beneficiary Contact Forms) for attendees at an enrollment event, even if they stayed afterwards to ask you questions.
- You only should enter an individual contact if you made a separate, future follow-up appointment for an individual.

# STARS Data Entry Instructions: Enrollment Event

- 1. Log into STARS.
- 2. Press **New Group Outreach and Education** on the home page, or hover over Tracking Inbox, then Group Outreach and Education, and press New Group Outreach and Education.

The screenshot shows the STARS application interface. At the top, there is a navigation bar with the following tabs: HOME (highlighted in red), TRACKING INBOX (highlighted in yellow), SEARCH, REPORTING, and CONFIGURATION. Below the navigation bar, the page title is "Home". The main content area displays a "Tracking Inbox : Group Outreach and Education" section. This section includes a dropdown menu set to "All Assignments" and a filter icon. Below this, there is a table with the following columns: Session Conducted By, Partner Organization Affiliation, SHIP Case Number, Start Date of Activity, and County of Event. The table contains one row of data: Michelle Grochocinski, Wisconsin SHIP, WI-21-719021, 06/23/2021, and Dane - WI. At the bottom of the screenshot, there is a yellow button labeled "+ New Group Outreach and Education".

Session Conducted By	Partner Organization Affiliation	SHIP Case Number	Start Date of Activity	County of Event
▶ Michelle Grochocinski	Wisconsin SHIP	WI-21-719021	06/23/2021	Dane - WI

# STARS Data Entry Instructions Continued

3. Complete the required fields.

For Type of Event, select **Enrollment Event**.

Total Time Spent (minutes)		*
Title of Interaction	<input type="text"/>	*
Type of Event	<input type="text" value="Enrollment Event"/>	*
Delivery Method	<input type="text"/>	
Number of Attendees	<input type="text"/>	*
Zip Code of Event	<input type="text"/>	*
State of Event	<input type="text" value="Wisconsin"/>	*
County of Event	<input type="text"/>	*

# PeerPlace Data Entry Instructions: Enrollment Event

User Tools
My Intakes
My Pushpins
My Ticklers
My Views

Program Tools
Resource Directory
<b>Public and Media Activity Report</b>
HIICAP Counselor Entry

1. Open the SHIP Program.
2. On the left-hand toolbar, press **Public and Media Activity Report**.

# PeerPlace Data Entry Instructions Continued

3. Press New PAM.
4. Complete the required fields. For Activity, select **Enrollment Event**.
5. Process the STARS Queue and check for errors.

Activity *:	Enrollment Event
Geographic Coverage:	Select One <input type="button" value="v"/>
Delivery Method:	Select One <input type="button" value="v"/>

# Conclusion

Resources

# Reporting Resources

- [PeerPlace User Guide \(PDF\)](#) (log in required)
- SHIP reporting
  - [MIPPA Reporting Instructions \(P-03087\) \(PDF\)](#)
  - [SHIP Reporting Instructions \(P-03179\) \(PDF\)](#)
- [STARS Manual \(PDF\)](#) (log in required)

# Caseload Management Resources

- [Benefit Specialist Programs Operations Manual \(P-03062-05\) \(PDF\)](#)
- [Medicare, Medicaid, Marketplace, and Social Security Administration Referral Resources for Wisconsin Residents \(P-03326\) \(PDF\)](#)

# Thank you!

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