

P-03019 (08/2026)



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Medicare Counseling and Outreach for Wisconsin Residents

Pamela Watson
SHIP and MIPPA
Grants Manager
SHIP Co-Director
August 2026

SHIP and MIPPA Counselor Orientation

Acknowledgements



This project was supported by the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$1,061,673 with 100 percent funding by ACL/HHS. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS, or the U.S. Government.

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

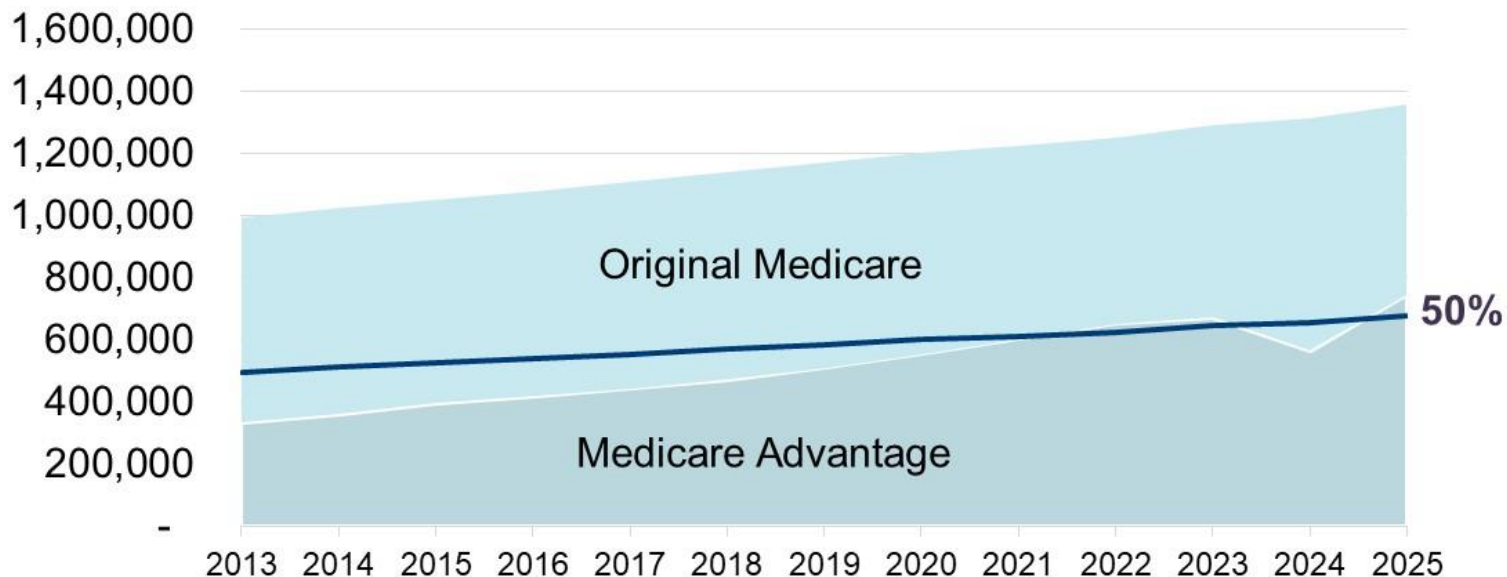


Resources

Wisconsin's Medicare Landscape

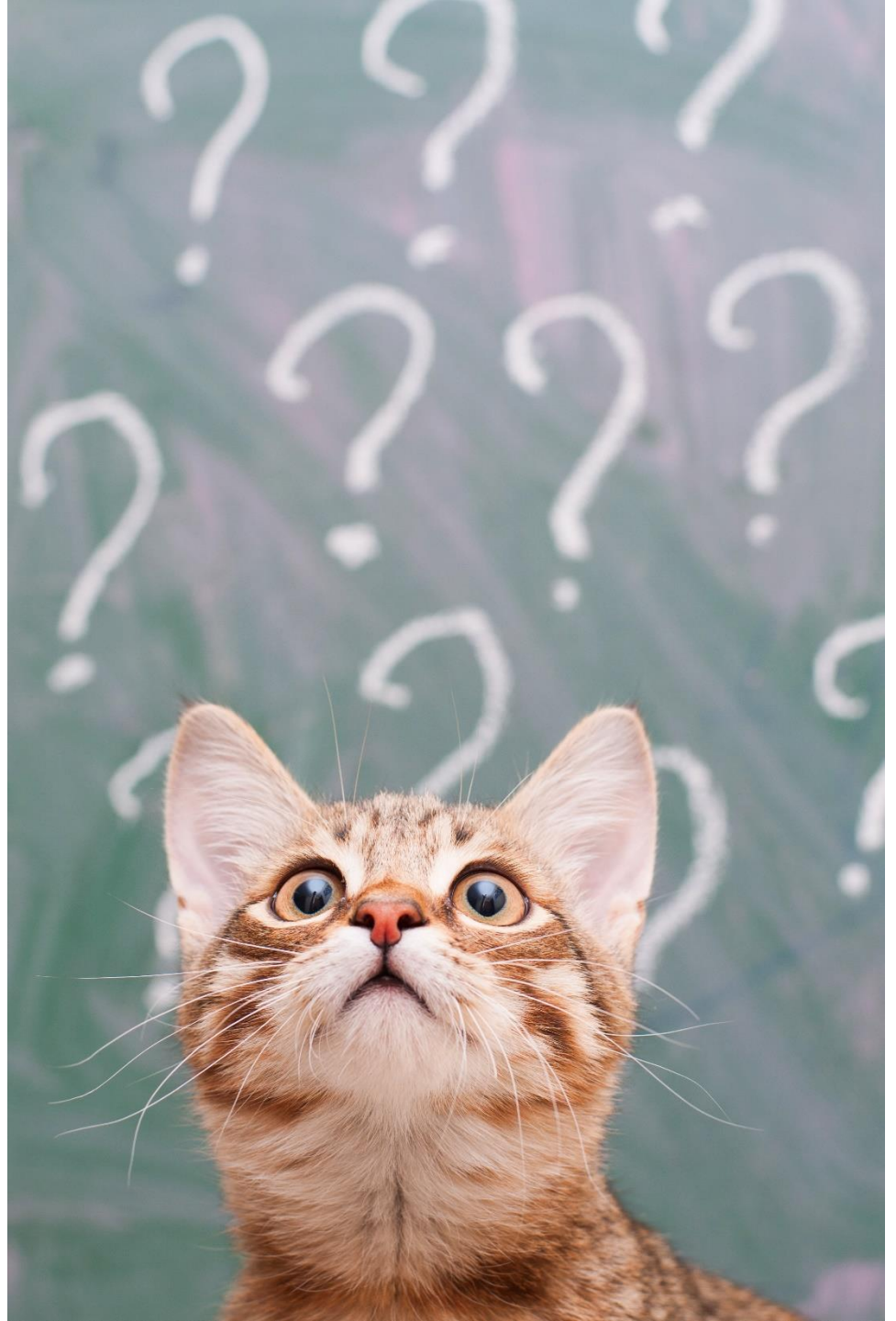
Medicare coverage options and the Wisconsin State Health Insurance Assistance Program (SHIP) Network

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.

Question Break One



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 \$890,000 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

800-242-1060

[Medigap Helpline](#)

(boaltc.wi.gov/Pages/Medigap/Medigap.aspx)

855-677-2783

[Medigap Part D and Prescription Drug Helpline](#)

(boaltc.wi.gov/Pages/Medigap/Medigap.aspx)

262-347-3045
**Video or
telephone**

[Office for the Deaf and Hard of Hearing](#)

(dhs.wisconsin.gov/odhh/benefits.htm)

Wisconsin Partners: Local Where?

- Where are SHIP counselors?
 - County and Tribal aging offices
 - Aging and disability resource centers (ADRCs)
 - In the community, where available
- More information is available on the [DHS Medicare Counseling webpage](#).

Wisconsin Partners: Local Who?

Who are SHIP counselors?

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

Comprehension Check One

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

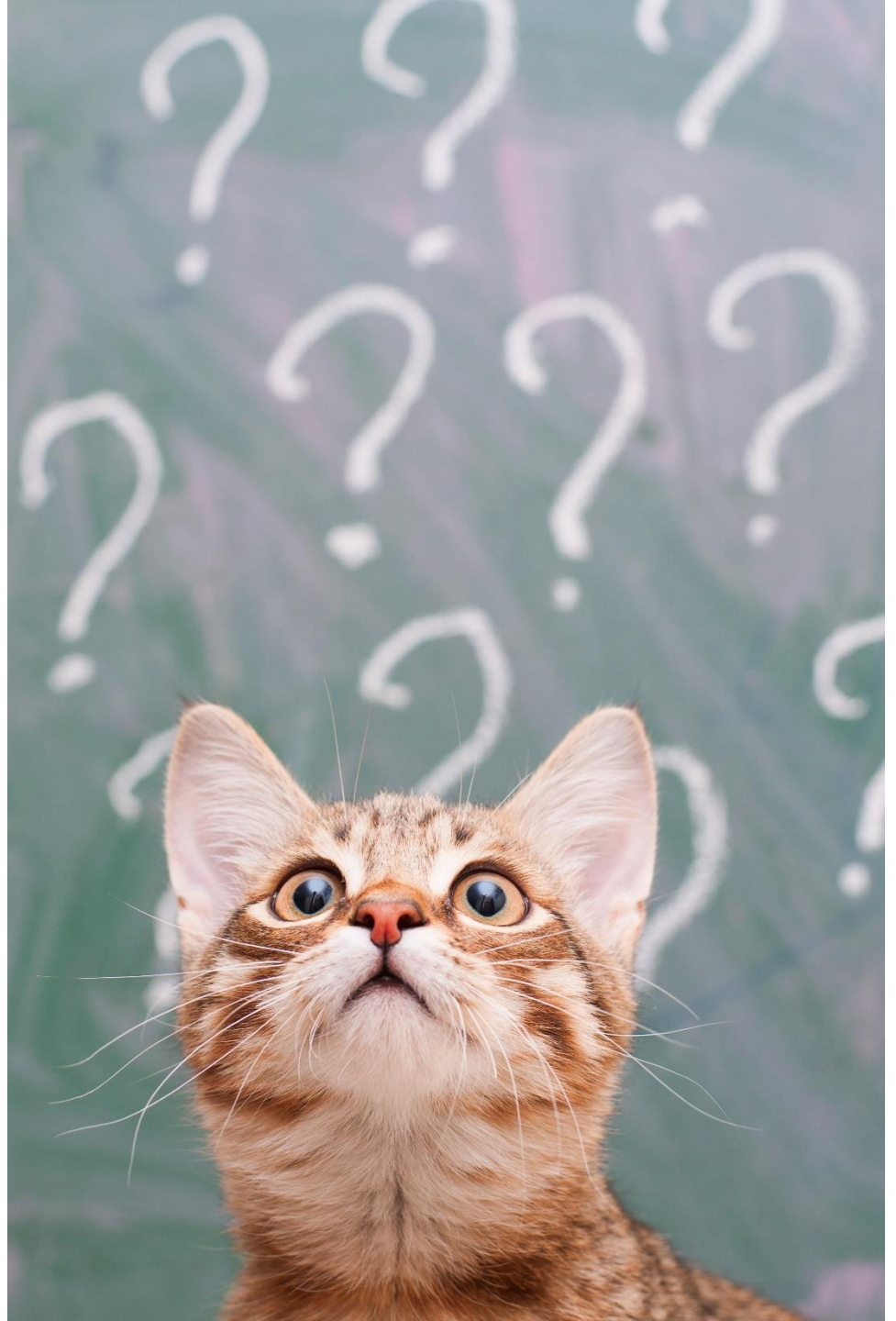
- a) True
- b) False



SHIP counselors tell people what Medicare plans to choose.

- a) True
- b) False

Question Break Two



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 current [Wisconsin SHIP Counselor Toolkit \(P-03179a, PDF\)](#) 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!**

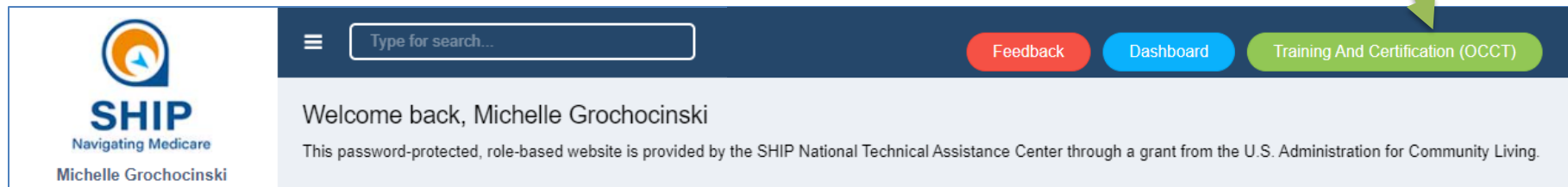
Certification

- 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
 - **Part D only:** Entry level certificate for volunteers who are just beginning to learn Medicare.

How to Get Certified

After you complete your Medicare training:

1. Log in to the [SHIP Technical Assistance \(TA\) Center](https://shiphelp.org) (shiphelp.org).
2. Press the green Training and Certification button.



3. Press Certification Tool.
4. Press Take Exam.

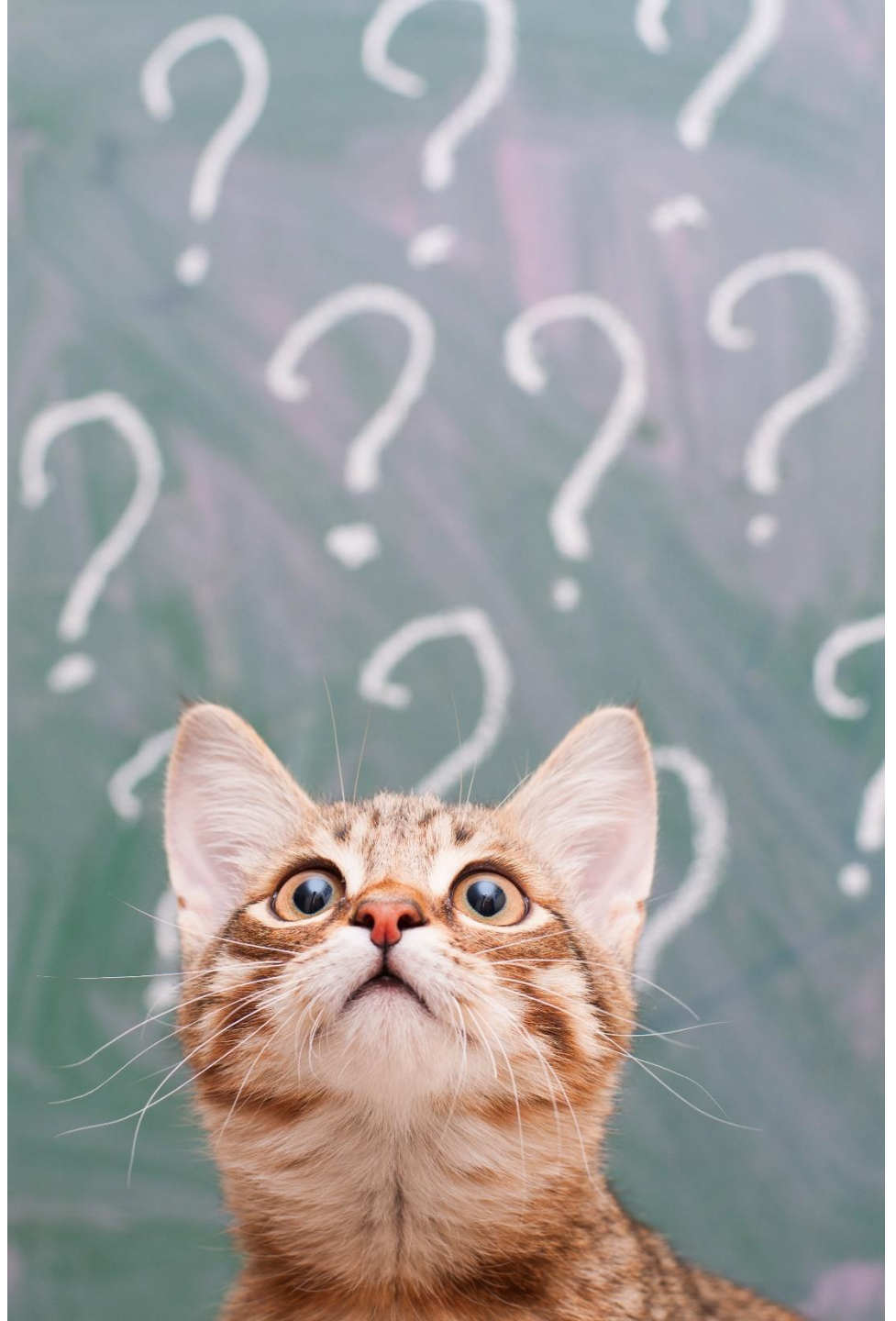
Email the [Wisconsin SHIP director](#) with issues.

Reminders

- ✓ Open book
([Wisconsin SHIP Counselor Toolkit \(P-03179a, PDF\)](#))
- ✓ No time limit
- ✓ 90% to pass
- ✓ Printable certificate
- ✓ One-and-done



Question Break Three



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 Two

- Reporting
 - Illustrates the impact of our work.
 - Informs outreach strategies.
 - Helps justify ongoing funding.
- Follow the [SHIP Reporting Instructions \(P-03179, PDF\)](#) and [MIPPA Reporting Instructions \(P-03087, PDF\)](#).



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@danecounty.gov) for entry into STARS.
- Medigap counselors enter data into WellSky for export to STARS.
- Benefit specialists staff enter data into PeerPlace for export to STARS.

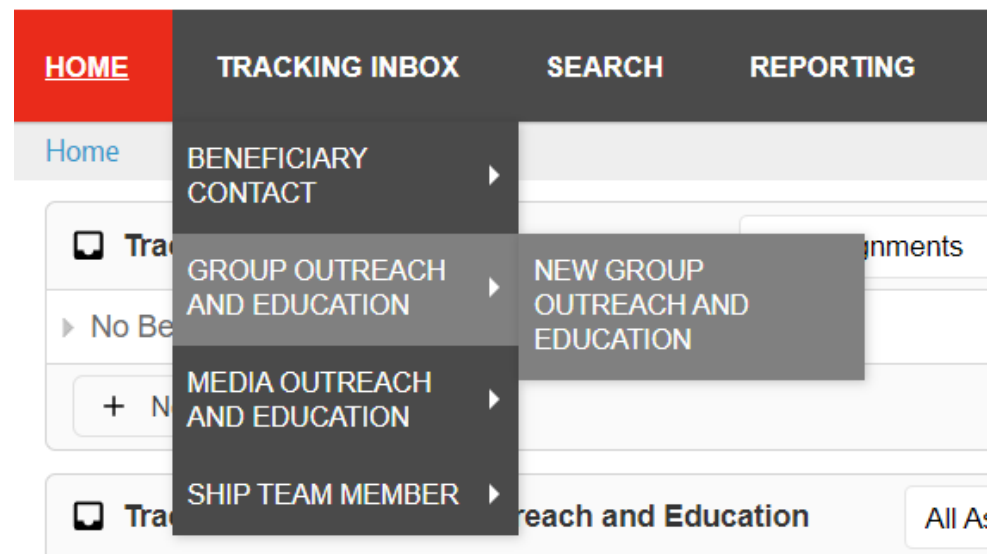
Reporting Beneficiary Contacts

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.

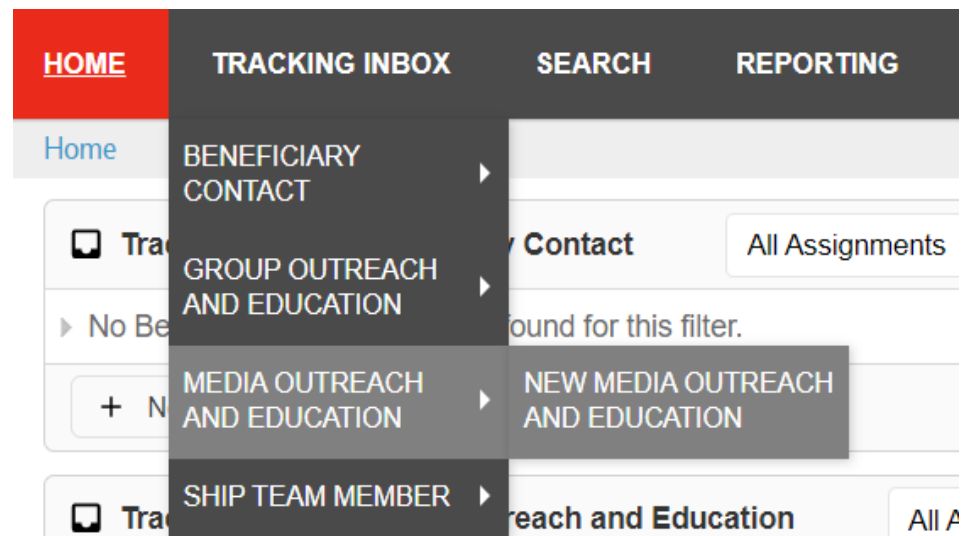
Reporting Group Outreach Activities

- 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

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

Open the [MIPPA Reporting Instructions \(P-03087, PDF\)](#) 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 \(P-00166, PDF\)](#).
- Email the [Wisconsin SHIP Director](#) for help pulling data for your site.

Reporting Systems Access Issues

STARS

Email STARS Helpdesk:

ResolveSoftSTARSHelpDesk@resolvesoft.com

PeerPlace

Email BADR Tech team:

DHSBADRTech@dhs.wisconsin.gov

Medigap
Helpline
counselors

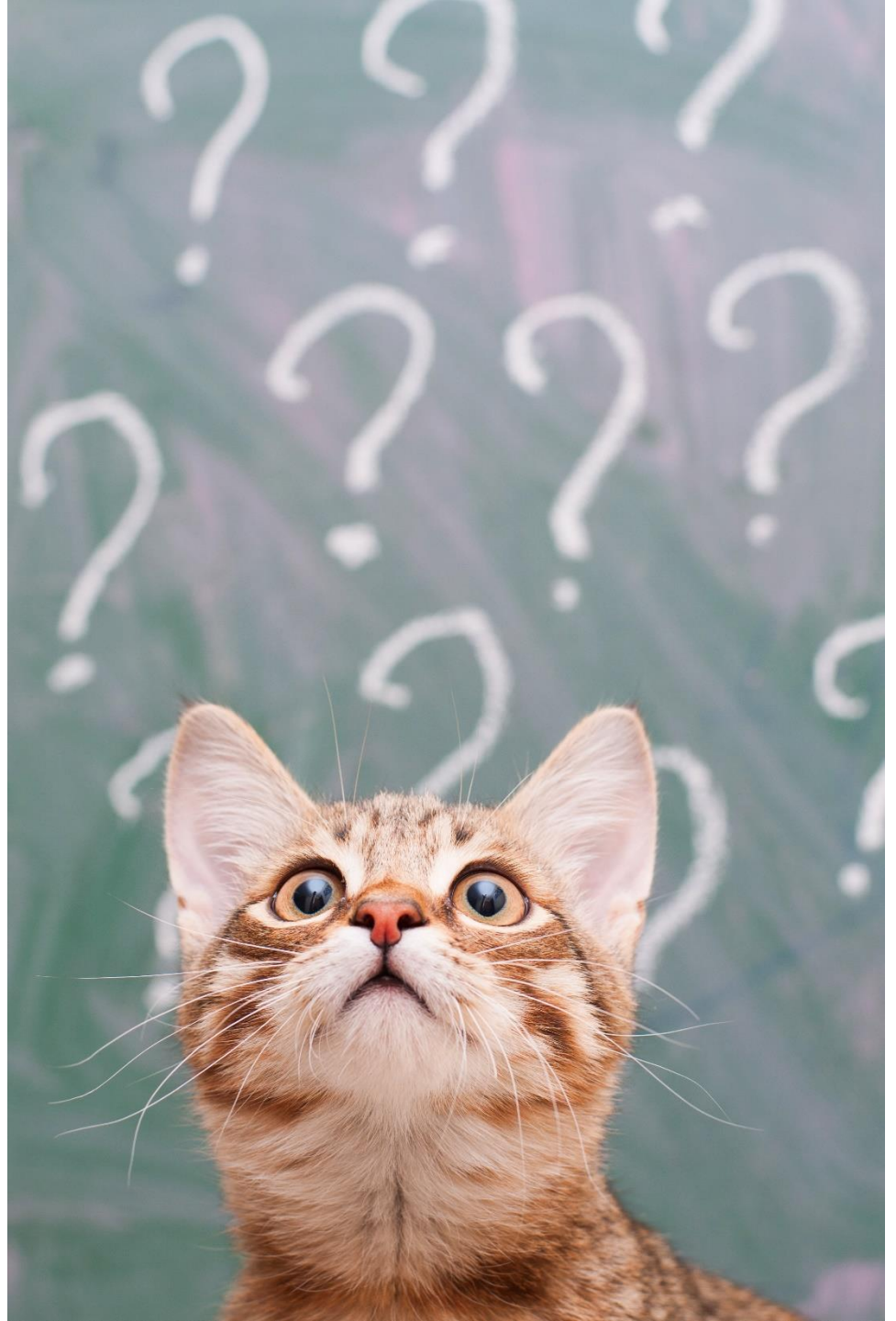
Email Vi Quang: Vi.Quang@wi.gov

Comprehension Check Two

SHIP counselors' beneficiary contacts, group outreach, and media outreach must be entered 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.

Question Break Four



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. Press “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](http://gwaar.org/Medicare-outreach-and-assistance-resources) (gwaar.org/Medicare-outreach-and-assistance-resources).
- Contact [GWAAR's Medicare Outreach Coordinator](#) for support with outreach.

Complaint Tracking Module (CTM)

- Report beneficiary problems with Medicare Advantage and Part D plans through a federal online system.
- Contact the Medigap Helpline to submit a complaint.

Centers for Medicare & Medicaid Services (CMS) Product Ordering

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



Medicare & You 2025

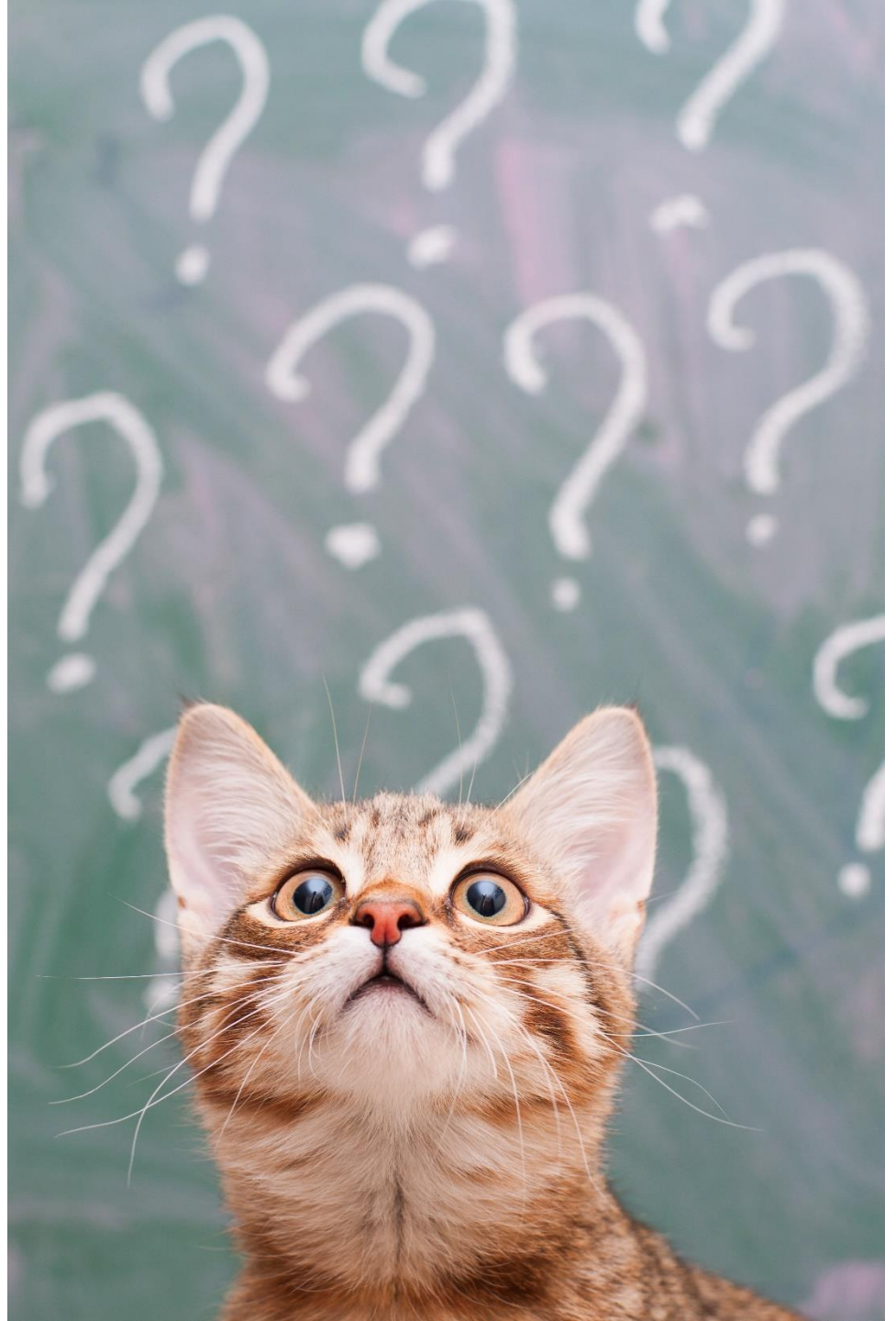
The official U.S. government
Medicare handbook



Additional Resources

- [CMS Training & Education](#)
- 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](http://gwaar.org/open-enrollment-toolkit) (gwaar.org/open-enrollment-toolkit)

Final Questions?



Presenter Contact Information



Michelle Grochocinski (she/her)

Elder Benefit Specialist Program Manager
Wisconsin SHIP Co-Director

Michelle.Grochocinski@dhs.wisconsin.gov

Office: 608-266-3840



Pamela “Pam” Watson (she/her)

SHIP and MIPPA Grants Manager
Wisconsin SHIP Co-Director

Pamela.Watson@dhs.wisconsin.gov

Office: 414-758-1282