

Counselor's Packet: A Support Tool for New Volunteers

Peggy McDonough, Norfolk County's Regional Program Director for Massachusetts's SHIP program, Serving the Health Information Needs of Elders (SHINE), saw that new volunteer counselors were having difficulty putting all the pieces together. They would complete the SHINE Certification Training but still feel apprehensive about applying all of the information when counseling. Peggy set out to fill that gap by developing a *Counselor's Packet*, a binder containing at-a-glance reference resources and handy counseling tools to support new counselors. Counselors need only refer back to the information on these "cheat sheets" when they are unsure. This package helps volunteer counselors to be prepared without feeling overwhelmed.

In the following Q&A, Peggy describes her *Counselor Packet* and how it is used by her volunteer counselors. If you have additional questions on how to create a counseling toolkit, please contact Peggy at pmcdonough@HESSCO.org.

Why did you decide to create the Counselor Packets?

I have been with SHINE for 15 years and currently work with 39 volunteers for a region with nearly 100,000 Medicare beneficiaries. A great deal of my work as Regional SHINE Director involves training volunteers, both new and on-going, and providing supervision and support to counselors. In this role, I am always looking for ways to ensure that our counselors have the information and resources they need to provide the most accurate information and assistance possible.

Upon completion of the SHINE certification training, my new counselors accompany me in the regional office. This provides them an opportunity to hear a variety of questions and issues from beneficiaries while also allowing me the chance to evaluate their comprehension of the material and ability to present the information to clients. Four years ago, a newly certified counselor arrived for her first day of mentoring with every single piece of paper she had received during the training. I realized that the new counselors had no idea what material they needed to have on hand. I could help by making sure that only necessary materials were included in the "SHINE" bag that counselors get when they complete their initial training.

I wanted to create a comprehensive counselors packet. First, I compiled a packet of material, now referred to as the *Counselor's Packet*, which includes information for clients and tools for the counselors. The packet includes information about Medicare and options/coverage in our regional area, along with information about public benefit programs. I also developed one-page "cheat-sheets," many of which are printed on different colored paper to assist counselors quickly identify important content. Topics

include the current year's Medicare costs and coverage for Original Medicare and Medicare Advantage, A and B deductibles and coinsurance, information on Massachusetts's State Prescription Assistance Program (SPAP), Medigap insurance, and the different enrollment periods. These one-pagers are housed inside clear paper-protectors, inside a binder, and placed in the SHINE bag.

I also created a Medicaid in Massachusetts (MassHealth) tool, so counselors can quickly determine when and if folks are eligible to enroll. In addition, I developed an instruction form to help counselors know exactly what Medicaid application to use and what parts of the application to fill out based on the program for which the beneficiary is applying.

What results have you seen since distributing the *Counselor's Packet*?

Counselors say it has been incredibly helpful. Even once the volunteers become more comfortable with the information, they know that they have a set of resources to fall back on. To keep the materials up-to-date, I ask them to bring their binders to every monthly meeting where we replace outdated material with more recent material as programs change during the year. Giving out the binders to all existing counselors was a big initial expense, but it is important to counselors. They feel confident that they have accurate, up-to-date material to assist their clients.

An additional benefit from this effort is that counselors feel supported and nurtured. They like that I invested so much into making their job easier. The result is that they are able to provide accurate information to clients and better reports to me.

What advice can you share?

I understand that developing forms can be both time consuming and expensive. However, sometimes we can work with existing material by "tweaking" it a bit to suit our needs. For example, the Massachusetts SPAP application has a rate schedule guide that lists eligibility categories by annual income. Most of our clients, however, give us their monthly income. In order to make this form work better for counselors, I added the monthly gross income in each category in red so it would stand out and be easy to read. By using an existing form, I was able to develop a counselor tool that makes their job a little easier. It is something I do on a regular basis, looking at forms we currently have and thinking about how I can make them work more efficiently.

The packet is regularly in need of updating because of the on-going changes to programs. Requiring counselors to bring the packet to monthly meetings is important in order to stay with the updates. It also gives us an opportunity to talk about ideas counselors have about additional tools or material they would find helpful. Involving the counselors in this process has been important. I always acknowledge and give credit to counselors who develop or contribute to our materials. It recognizes their work and encourages others to share their ideas.