

## State of the SHIPs

### A Summary of Results from the 2008 SHIPs' Needs Survey January 2009

#### I. Introduction

In October 2008 HAP sent out its second annual SHIPs' Needs Survey to the 54 State Directors. The purpose was to learn more about the SHIP network's needs and priorities for the coming year so that HAP can continue to be a helpful and effective partner in serving the nation's 45 million Medicare beneficiaries. The survey included 20 questions on four main topics: training, certification, reporting, and HAP's role in meeting SHIPs' needs. The survey results confirmed that while each SHIP is unique, they also share a number of common priorities and challenges.

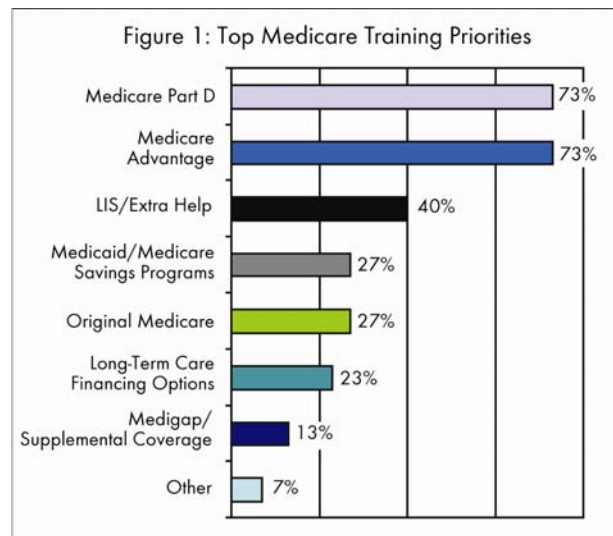
Thirty SHIP Directors (56 percent) responded to the survey. Of the respondents, 70 percent are housed in aging departments, and the remaining 30 percent are housed in insurance departments. This distribution is representative of the SHIP network as a whole (see Appendix A).

#### II. State of SHIPs

##### A. Training

###### Medicare Part D and Medicare Advantage are training priorities

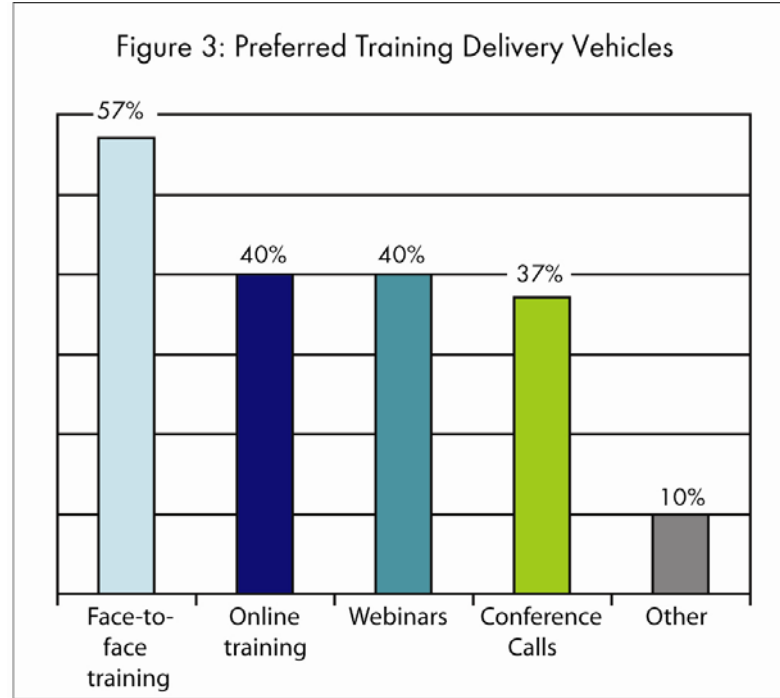
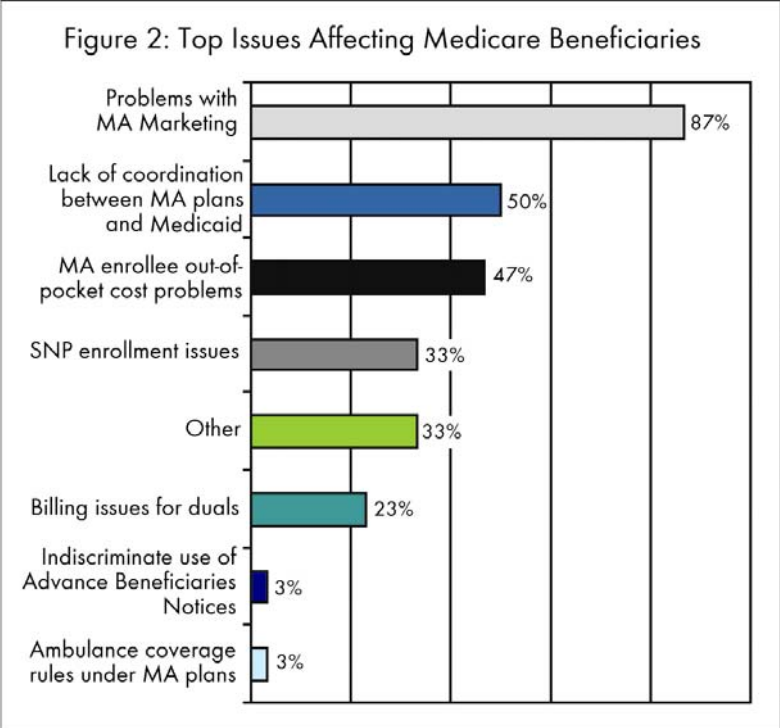
The Medicare Modernization Act of 2003 has significantly changed the training needs of SHIP programs. The majority of SHIPs (73 percent) identified Medicare Part D and Medicare Advantage among the top three training priorities for their programs. In contrast, only about one-quarter (27 percent) of SHIPs identified Original Medicare as one of their top training priorities (see Figure 1).



The emphasis on Medicare Advantage training reflects the issues that SHIPs are encountering in the field with Medicare beneficiaries. Problems related to Medicare Advantage, specifically marketing abuses by plans and the lack of coordination between Medicare Advantage plans and Medicaid plans, are among the common issues that SHIPs are asked to help address. In addition, more than half of SHIPs surveyed—53 percent—reported that an online tracking tool and training program to address issues affecting Medicare beneficiaries would be beneficial to their program (see Figure 2).

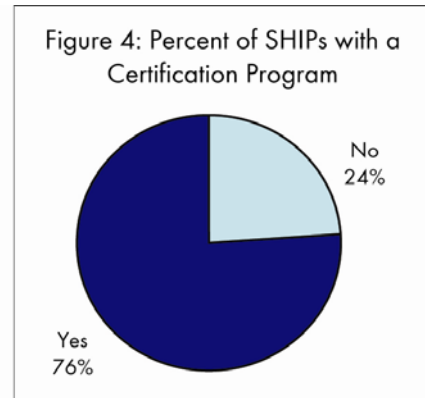
**Face-to-face training is the preferred training delivery vehicle**

Although more than half of SHIPs—57 percent—prefer face-to-face training, a substantial percentage—40 percent—also feel that long-distance training is a helpful tool in meeting their training priorities (see Figure 3). Long-distance training includes online training and webinars. (For the purposes of this survey, online training was defined as online self-study materials including reading materials and interactive exercises.)



## B. Certification

The concept of certification is common among volunteer programs, and SHIPs are no exception. More than three-quarters—76 percent—of SHIPs report having a certification program. However, certification programs vary widely across the network in order to meet the unique operational and beneficiary needs of each SHIP (see Figure 4).

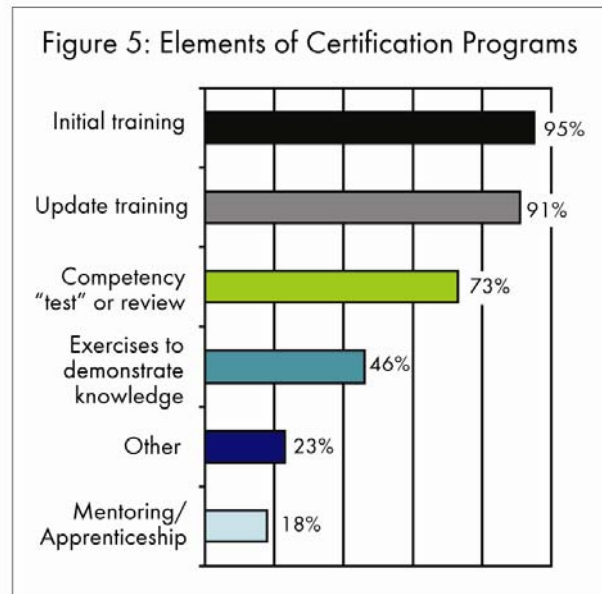


### SHIPs vary widely in how they define a “certified counselor”

- “One who has undergone training and done some counseling under the supervision of an experienced counselor.”
- “Counselor who has been tested on their particular volunteer role and has proven to be knowledgeable and effective in his/her roles and responsibilities.”
- “Someone who is screened, has undergone a background check, has signed the appropriate forms, attended 2 days of new volunteer training, completed 10 hours of mentored counseling sessions, and successfully completed on-line training modules and test questions.”

### Training is a critical component of certification programs

Although SHIPs use a variety of elements to create a comprehensive certification program that meets their needs, training is a prominent feature. Over 90 percent of SHIPs reported that initial and update trainings are included in their certification programs, and almost three-quarters—73 percent—require completion of a test or review (see Figure 5). Other elements, although not as common, include requiring a counselor to complete a certain number of Client Contact Forms, demonstrating “people skills,” and having the ability to resolve problems.



## SHIP Certification Profiles

### SHIP A:

- Initial training (16 hours)
- Update training (16 hours)
- Open manual certification “test”

### SHIP B:

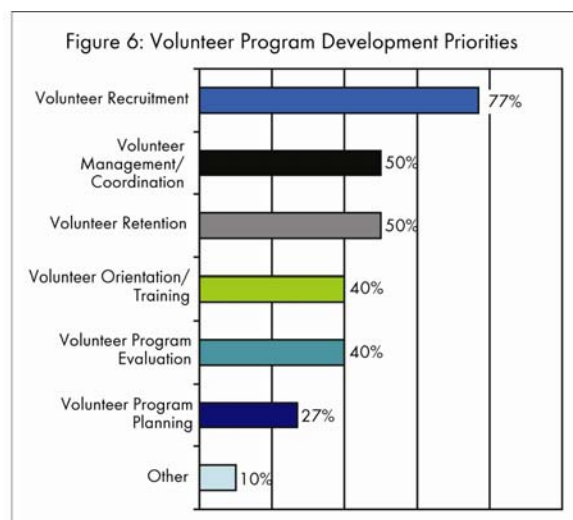
- Initial training (4 days)
- Update training (2 years)
- Mentoring
- Exercises

## C. Volunteer Program Development

### Recruiting volunteers is a top priority

Given the complexity of Medicare and the growing demand for services, finding volunteers is a top priority for SHIP programs. More than three-quarters—77 percent reported that volunteer recruitment is a top priority for their volunteer program (see Figure 6). Half of SHIPs also reported that volunteer management and retention are top priorities.

To respond to the increased demand for services and the preferences of “boomer” generation volunteers, many SHIPs are developing role-based volunteer programs to increase their workforce. Almost one-third of SHIPs reported that they could benefit from a project that would develop and implement a role-based volunteer program.

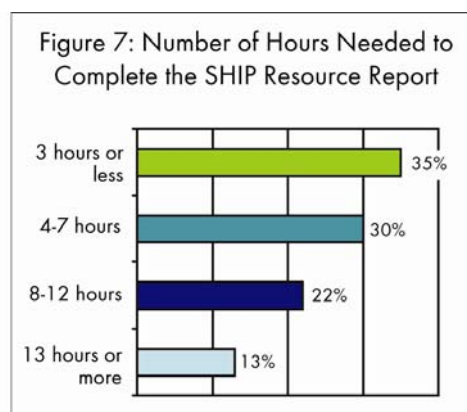


## D. Reporting

### Paper-based forms are still a common method used to collect data

About 40 percent of SHIPs reported that they use paper-based forms to collect information about the services provided by their programs, including individual counseling sessions and community events.

With regard to the SHIP Resource Report, a bi-annual report for CMS (Centers for Medicare & Medicaid) which captures information about the number of volunteers



and volunteer counseling hours, SHIPs reported that the length of time it takes to complete the report ranges from 2 to 24 hours, for an average of 7 hours (see Figure 7). Most SHIPs complete this report manually, tallying information from various paper-based forms.

### SHIPs Offer Recommendations to Improve the Reporting Process

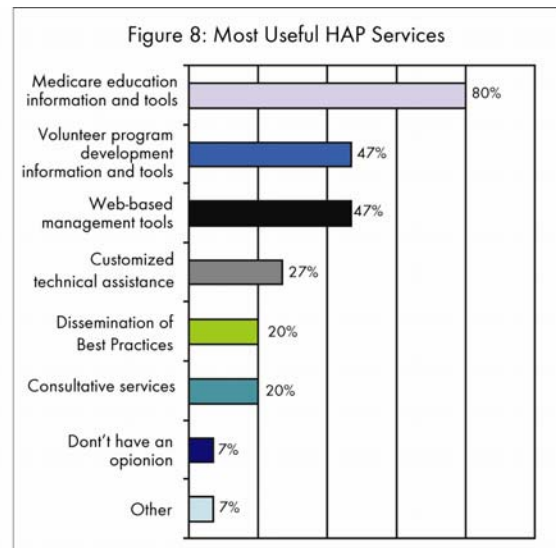
To better understand and meet the reporting needs of SHIPs, respondents were asked “what, if anything, could improve the process for SHIP staff and volunteers to report on Client Contact Forms and Public and Media Activity Forms?” Below are several responses:

- “Reporting of dual eligibles with mental illness should be incorporated within the values of data elements so that no extra data in ‘other’ needs to be added. We would get much more complete reporting.”
- “To be able to break up the data into regions based on zip code or county”
- “Computer coordination with SMP programs and SAMS programs”
- “If locals had the ability to report their results on-line directly into SHIPTalk rather than having to fax or mail their written reports to regional offices to be collected and then regional offices submitting to State office for final statewide collection”
- “Scannable forms”

## III. State of HAP

### HAP is viewed as a resource on Medicare information

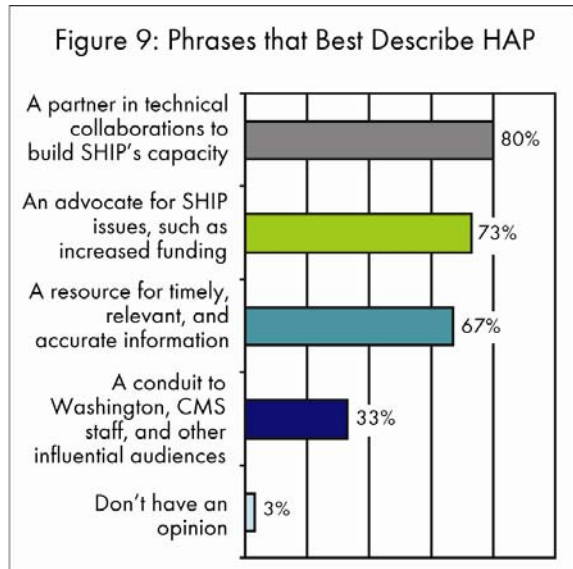
The majority of SHIPs—80 percent—report that the delivery of Medicare education information and tools (e.g., updates on Medicare statutes, provisions, and regulations) is one of the most useful services that HAP provides (see Figure 8). In addition, almost half of SHIPs report that web-based management tools (e.g., SHIPTools) and volunteer program development tools are among the top three most useful services provided by HAP.



## SHIPs view HAP as an important partner

The majority of SHIPs that responded—80 percent—identified HAP as a partner in technical collaborations that provide intensive, customized assistance to help build the capacity of SHIPs in the areas of Medicare education and program development (see Figure 9). Examples of these capacity-building partnerships include training on Medicare Advantage and developing and managing volunteer programs to help SHIPs serve the growing number of Medicare beneficiaries.

In addition, almost three-quarters of responding states also selected HAP as an advocate for SHIP issues, including increased federal funding. In addition to its work to increase federal funding for SHIPs, HAP also engages in public education activities to promote the tremendous value that SHIPs provide to Medicare beneficiaries. HAP also works with key leaders in the aging network to provide ongoing feedback to the Medicare program.



### ***About HAP***

The Health Assistance Partnership ([www.hapnetwork.org](http://www.hapnetwork.org)), a project of Families USA, partners with SHIPs on capacity-building initiatives in the areas of Medicare education and program development. Join the HAP Community to stay connected with new HAP tools, resources from the SHIP network, and news on issues affecting SHIPs and Medicare beneficiaries!

### ***About SHIPs***

State Health Insurance Assistance Programs (SHIPs) are the local access point to the Medicare system for its 45 million beneficiaries. SHIPs are federally funded programs, and work at the state, county, and local level to assist Medicare beneficiaries in accessing and navigating the Medicare program. They provide free and individualized information and counseling on Medicare and Medicaid issues and public benefits, as well as on Medicare Advantage (MA) plans, Part D prescription drug plans, long-term care insurance and the resolution of claims and billing problems. To learn more about SHIPs, please visit our web site at:

<http://www.hapnetwork.org/about/about-ships.html>.

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