

SHIPs' Needs:

Summary of Survey Results
from 41 SHIP Directors

April 2007

HealthAssistance
PARTNERSHIP

Background on the Survey

- In March of 2007, the Health Assistance Partnership distributed a six-question survey to all State SHIP Directors (including DC and the three territories) to assess their needs in four areas:
 - o reporting,
 - o quality assurance,
 - o training, and
 - o technology.
- Survey Monkey was used to collect and analyze the results.
- More than 75% of State Directors completed the survey (41 of 54).

Executive Summary

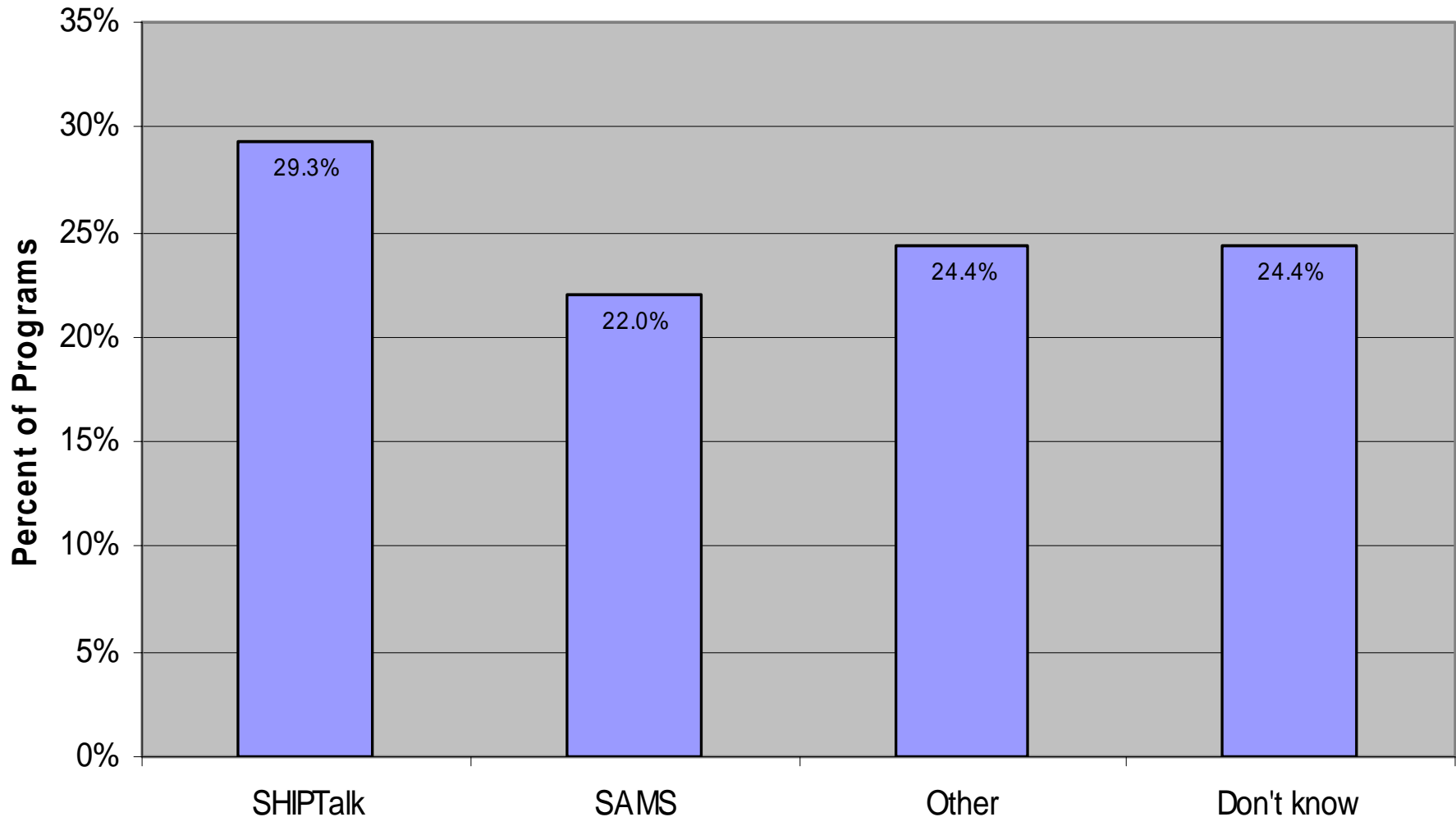
- Many state and local programs are reporting information about SHIP services into more than one database.
- SHIP programs vary considerably in terms of their capacity to develop and implement quality assurance systems, and in the use of technology to support program operations.
- Although many SHIPs expressed an interest in improving their program operations, limited resources are a stumbling block.
- SHIPs' training needs generally fall into two categories:
 - o Information and resources on specific substantive areas including group health plans, Medigap and Medicare Advantage
 - o Skills-building to improve overall program operations including counseling skills, volunteer program development, and strategic planning and evaluation

Survey Questions: Reporting

- HAP's work with several state SHIP programs has highlighted the burden placed on programs that must double-enter data about the provision of SHIP services due to incompatible data collection systems.
- Questions related to reporting were designed to assess the prevalence of this burden, with an eye towards potential solutions.
 - o What type of database does your **state** agency use to collect information about the services they provide?
 - o What type(s) of database do your **local** SHIP programs use to collect information about the services they provide?

Survey Results: State Reporting

Which type of database does your state agency use to collect information about the services they provide?

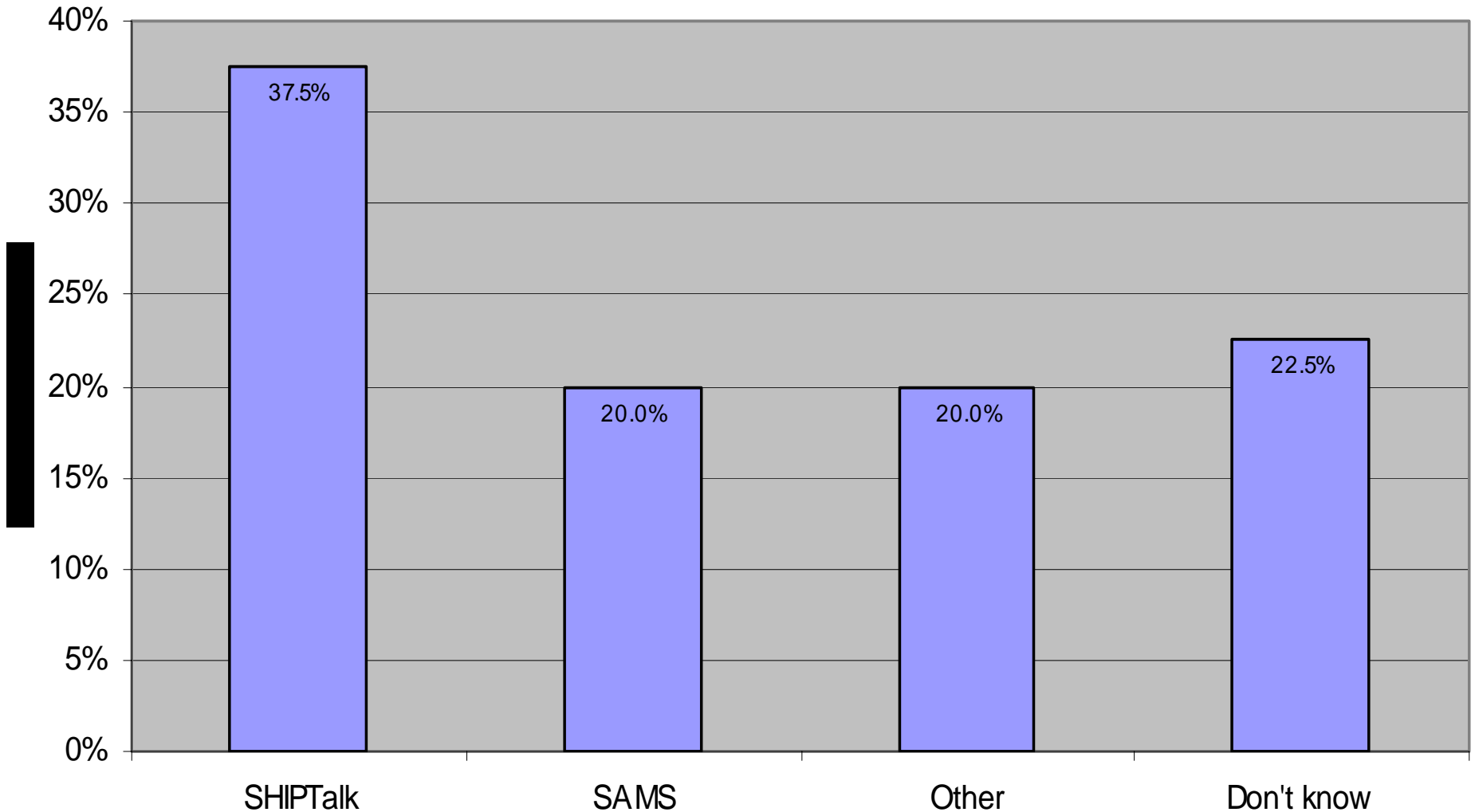


Survey Results: State Reporting

- “Other” databases that state agencies use include:
 - o Proprietary systems
 - o Microsoft Access
 - o AIMS
 - o eNPR (HAP’s electronic National Performance Reporting service)
 - o Microsoft Excel
 - o Q-Continuum

Survey Results: Local Reporting

Which database(s) do your local programs use to collect information about the services they provide?



Survey Results: Local Reporting

- “Other” databases that local programs use include:
 - o Proprietary systems
 - o Microsoft Access
 - o AIMS
 - o eNPR (HAP’s electronic National Performance Reporting service)

Survey Results: Reporting

- Many state and local programs are reporting information about SHIP services into more than one database. This is problematic for several reasons.
 - o SHIPs' services may not be accurately captured.
 - o The need to "double-enter" data potentially takes away from time that counselors could be spending helping Medicare beneficiaries.
- As noted later on in the presentation, SHIPs are interested in finding ways to eliminate the need to "double-enter" data.

Survey Questions: Quality Assurance

- Counselor Certification
 - o Many SHIPs have developed or are in the process of developing counselor certification and recertification processes as a way to address quality assurance.
- To help disseminate replicable and innovative ideas and explore new ideas, HAP asked about counselor certification:
 - o Does your program certify counselors on Medicare and related-programs?
 - o If yes, please describe the process.

Survey Results: Quality Assurance

- Counselor Certification
 - o More than three-quarters (76%) of state programs certify their counselors
 - o Certification processes vary greatly
 - o Initial training programs vary greatly
 - o Recertification may be less common
 - (Note: Recertification was not specifically addressed in the survey. However, some Directors shared this information.)

Survey Results: Quality Assurance

- Examples of counselor certification programs include:
 - o Completion of an initial training (20)
 - o Web-based reviews or tests following an initial training (6)
 - o Pre- and post-tests coupled with an initial training (2)
 - o “Self-study” reviews that test a counselor’s ability to locate information in the training manual (2)

Survey Results: Quality Assurance

- Initial training programs for new counselors vary greatly in duration:
 - o 16-18 hours (6)
 - o 24-28 hours (8)
 - o 30-32 hours (2)
 - o 40-60 hours (1)
 - o > 60 hours (1)

Survey Results: Quality Assurance

- Reported annual recertification processes generally involve either attendance at “update trainings” and/or completion of a review.
 - o Three programs only require counselors to attend update trainings.
 - Update trainings range from 4-16 hours
 - o Three programs require counselors to attend update trainings and complete a review.
 - Update trainings range from 8-16 hours
 - o One program reported that counselors only need to pass a recertification exam.
 - o Another program reported that counselors must take an annual recertification exam; those who score lower than 85% must attend additional trainings on specific areas.
- One program reported that it recertifies volunteers every 6 months based on their volunteer hours and training attendance.

Survey Results: Quality Assurance

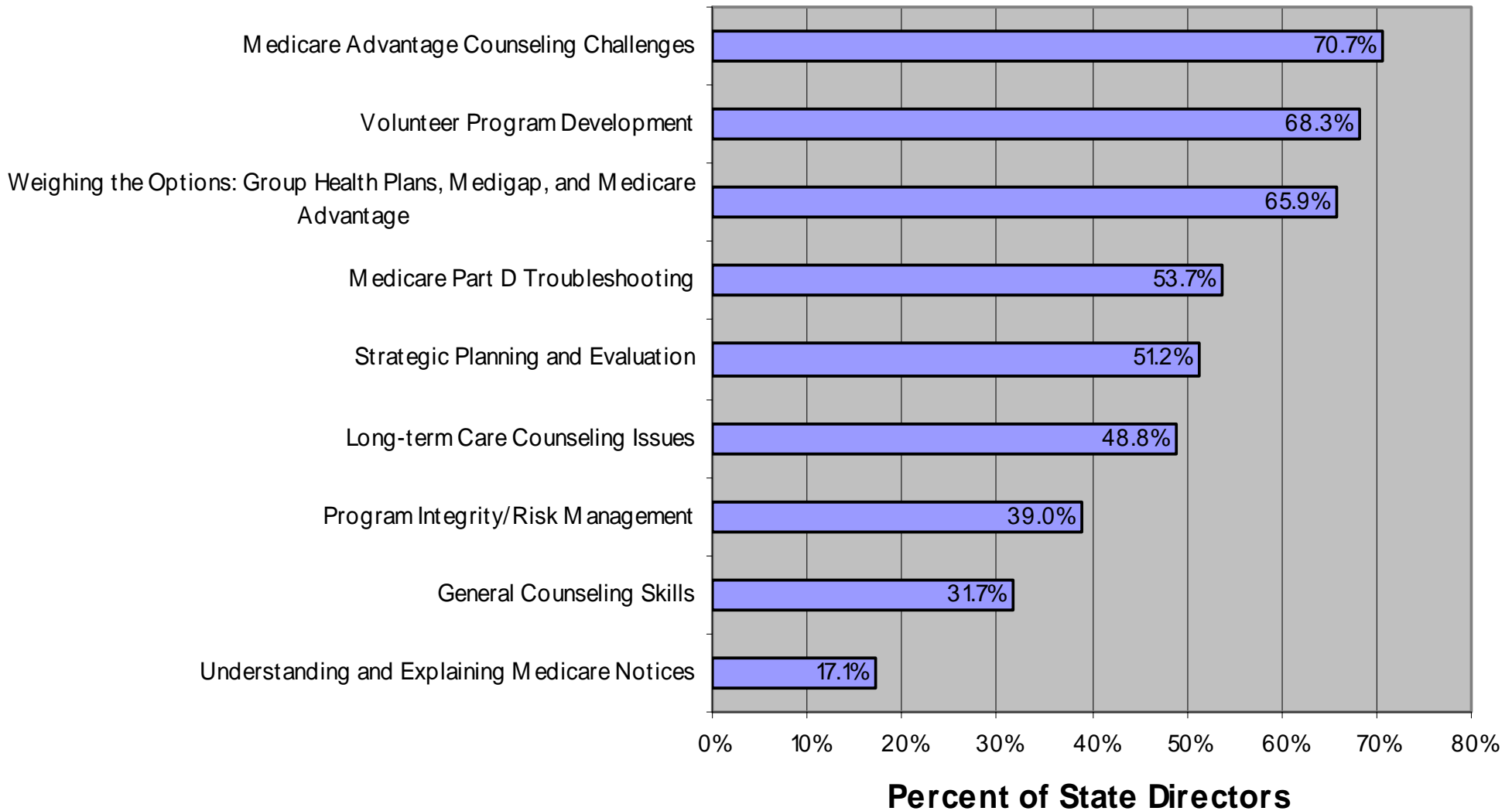
- Other quality assurance measures reported by State Directors include:
 - o Three programs use “shadowing” or “mentoring” in which new counselors are shadowed/mentored by veteran volunteers
 - o One program gives scholarships to counselors to attend the state’s Annual Conference on Aging, and identifies training tracks on their itinerary as part of the certification process.
 - o One program offers two levels of certification
 - Benefits Counselor I:
 - Complete 25 hours of training on a variety of topics including, but not limited to, Medicare, Medicaid, long-term care insurance, and due process; pass a written exam; and fulfill a 20-hour counseling practice requirement.
 - Benefits Counselor II
 - In addition to completing the above requirements, these counselors must complete five additional hours of training on Administrative Hearings and successfully hold a “mock trial.”

Survey Questions: Training

- To learn more about the education and training needs of SHIPs, HAP asked Directors to identify topics—both substantive and operational—that would be most helpful to supplement their program’s information and training needs.
- More than two-thirds of State Directors identified two topics of interest:
 - o Medicare Advantage Counseling Challenges
 - o Volunteer Program Development

Survey Results: Training

Which of the following topics would be most helpful to supplement your program's information and training resources?



Survey Questions: Technology

- SHIPs are increasingly exploring technology as a way to help meet increasing demands and deliver services more efficiently and effectively.
- To help disseminate replicable and innovative ideas and explore new ideas, HAP asked the Directors to share any technology applications or solutions that their program is currently using or exploring to address a program need.

Survey Results: Technology

- About two-thirds—66%—of SHIP Directors responded to the question.
- Use of or interest in technology to support SHIP programs generally focused around four areas:
 - o reporting,
 - o communication,
 - o training, and
 - o quality assurance.

Survey Results: Technology

- **Reporting**

- o Several programs are using electronic reporting systems

- One Director reported that her program developed an electronic version of the client contact form (CCF) that “dumps” into a database; data are then uploaded into SHIPTalk.

- This “paperless” system is more efficient for counselors who are in the field with laptops.

- Two Directors reported using a Web-based system, including HAP’s electronic National Performance Reporting (eNPR) service, to collect and submit NPR data directly into SHIPTalk.

- Some Directors shared their “wish-lists:”

- o Reducing the time counselors spend to report information in two different databases (SAMS and SHIPTalk) by finding a way to make systems “talk” to each other

- o Web-based reporting systems

Survey Results: Technology

- **Communication:** Vehicles to communicate information to staff and volunteers more efficiently include:
 - o Email/List-servs
 - o Website postings including counselor handbook and volunteer recruitment materials, presentation materials
 - o Electronic newsletters
 - o SHIPTalk

Survey Results: Technology

- Counselor Training

- o Long-distance training methods, particularly those that are Web-based, are of high interest to SHIP Directors.
- o About one-third of Directors reported that they are exploring or experimenting with Web-based training.
- o Directors also reported other forms of long-distance training that they are currently using or have used in the past:
 - Videoconferencing
 - Teleconferences
 - Satellite trainings
 - Macromedia Breeze
- o Limited resources are an obstacle to implementing long-distance training methods.

Survey Results: Technology

- **Quality Assurance:** Several states use technology to support quality assurance initiatives
 - o Certification
 - Web-based reviews
 - Online Recertification System (ORS)
 - o One program reported using its hotline to train new volunteers spread across the state: “New volunteers listen to a certified counselor answer a call from a Medicare beneficiary. When the call is finished the beneficiary hangs up, and the two counselors discuss the call.”
 - o Another program indicated that a casework tracking system was recently developed.
 - o One program expressed an interest a Web-based volunteer management system.

Conclusion

- Many state and local programs are reporting information about SHIP services into more than one database.
 - Such inefficiencies take time away from providing valuable services.
 - SHIPs and Medicare beneficiaries nationwide would benefit from a more streamlined reporting process.
- SHIPs are interested in using technology to support program operations including reporting, communication, training and quality assurance.
 - Limited resources are a stumbling block to implementing new technologies.
 - Developing cost-effective and replicable technology tools would benefit SHIPs and Medicare beneficiaries nationwide.
- Changes to the Medicare program coupled with changes in the Medicare population have highlighted the need for more skills-building training.
 - SHIPs' interests largely center around improving counseling skills and developing stronger volunteer programs, thereby allowing them to reach a larger number of Medicare beneficiaries.