



**Vermont
Association of
Area Agencies
on Aging**

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(802) 578-7094
www.Vermont4A.org

Member Agencies:

Age Well
Central Vermont Council on Aging
Northeast Kingdom Council on Aging
Southwestern Vermont Council on Aging
Senior Solutions

VERMONT



ORIENTATION & TRAINING MANUAL

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INTRODUCTION

SHIP is the State Health Insurance Assistance Program. The SHIP program provides direct assistance to Medicare beneficiaries, and individuals about to become eligible, with eligibility and enrollment in Medicare and other health care programs like Medicaid, Medicare Savings Programs (MSP), Low Income Subsidy (LIS), VPharm, and Long Term Care Insurance. SHIP also does outreach and education about Medicare for beneficiaries and service providers who also work with Medicare beneficiaries. Every state has a SHIP program, funded by the Administration of Community Living (ACL).

MIPPA (Medicare Improvements for Patients and Providers Act) is additional funding for SHIP to focus outreach, education and assistance to low income Medicare beneficiaries on financial assistance paying some of Medicare's costs and on preventive services.

ACL funding for both SHIP and MIPPA goes to the Vermont Department of Disabilities, Aging and Independent Living (DAIL). DAIL contracts with the Vermont Association of Area Agencies on Aging (V4A) to administer SHIP. V4A subcontracts with each Area Agency on Aging (AAA) to provide SHIP services, including MIPPA, in their service area. The SHIP Director is part of V4A.

The SHIP grant year is April 1 to March 31.

The MIPPA grant year is September 30 to September 29.

VERMONT SHIP PROGRAM STAFF

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38 Pleasant St.

Springfield, VT 05156

802-885-2655

HelpLine 800-642-5119

SHIP STAFFING AND RESPONSIBILITIES

SHIP Coordinators

Each AAA determines its SHIP staffing levels, and hires and supervises its SHIP staff. Each AAA has a SHIP Coordinator who works at least 20 hours/week. In some of the AAAs, other staff assist with SHIP work, like I & A staff, case managers, etc. Some AAAs also have SHIP volunteers who may help with administrative work or provide assistance to Medicare beneficiaries under the supervision of the SHIP Coordinator.

SHIP staff assist Medicare beneficiaries with:

- Medicare Parts A, B, C and D eligibility and enrollment
- Low Income Subsidy (LIS)
- Eligibility and enrollment in Medicaid, Medicare Savings Programs and VPharm
- Long Term Care Insurance
- Medicare Supplemental Insurance
- Transition from coverage through Vermont Health Connect to Medicare.
- Accessing covered benefits

SHIP staff also do outreach and education about Medicare and to publicize SHIP services, including:

- Conducting “New to Medicare” classes for beneficiaries
- Conducting trainings for community partners and providers who assist Medicare beneficiaries
- Distributing information about SHIP, publicizing trainings and classes, attending health fairs, etc.

Data Collection and Reporting

SAMS

SAMS is the proprietary data base that AAAs use to record SHIP data (and other AAA program data). SHIP staff must be entered in STARS as a “team member”, and their STARS eFile ID must be entered in SAMS (see STARS below).

The STARS/SHIP Reporter Guide provides instructions on how to enter information about staff in SAMS, and how to complete the Beneficiary Contact, Group Outreach and Education, and Media Outreach and Education forms.

STARS (SHIP Tracking and Reporting System)

STARS is the national SHIP database. As of October 1, 2018, STARS replaced the prior federal SHIP data base, NPR (National Performance Reporting). SHIP Beneficiary Contacts, Group Outreach and Education, and Media Outreach and Education are entered in SAMS on the relevant form. The data on these forms entered in SAMS is transferred in real time to STARS.

SHIP staff and AAA staff doing SHIP work need to be entered in STARS as a “team member” by the SHIP Director or authorized AAA staff. This creates a STARS eFile ID. The eFile ID is also entered in SAMS so that any data entered is connected to the eFile ID and allows for Beneficiary Contact, Group Outreach and Education, and Media Outreach and Education forms to be transferred to STARS from SAMS.

Staff who need to be able to log into the STARS database will need a user name and password (called “credentials”). Credentials are needed to correct any forms in STARS, and to run data searches. Credentials are sent by email from STARS by the SHIP Director or authorized AAA staff person..

STARS log in:

<https://acl.entellitrak.com/etk-hhs-acl-prod/login.request.do>

STARS resources and job aids:

<https://acl.entellitrak.com/etk-hhs-acl-prod/page.request.do?page=page.starshome>

Quarterly Reports

Quarterly Reports are due to the SHIP Director 30 days after the end of the quarter on the Quarterly Report Form. The quarterly report meets both SHIP and MIPPA reporting requirements.

Quarterly Reports are due:

April 24 (January-March)

July 31 (April-June)

October 23 (July-September)

January 31 (October-December)

Feedback Forms

SHIP staff must also use the Feedback Form at their classes and trainings, which the SHIP Director uses for reports to DAIL.

DAIL and ACL Reports

The SHIP Director is responsible for meeting DAIL and ACL reporting requirements established in the DAIL contract and ACL Notices of Awards

SHIP DIRECTOR

The SHIP Director works at V4A and is responsible for the overall management of the program. The SHIP Director’s duties include:

- Management and coordination of statewide SHIP and MIPPA grants, including V4A contracts with AAAs
- Meeting all DAIL and ACL reporting requirements for SHIP and MIPPA
- Scheduling monthly meetings (except during open enrollment) with the SHIP staff by conference call or in-person meetings. In-person meetings should be held quarterly at a minimum.
- Providing technical assistance and support, including visiting each AAA office at least once a year
- Providing regular updates on substantive information related to Medicare, Medicaid and other relevant programs to SHIP staff
- Working with the V4A Executive Director and DAIL contract manager
- Developing and maintaining working relationships with state and local service providers and partners and consumer groups
- Maintaining constructive working relationships with relevant state and federal agencies

SHIP CERTIFICATION AND RECERTIFICATION GUIDELINES

The SHIP Certification and Recertification Guidelines explain the requirements for certification, including who must be certified, how to become certified, and training requirements for both certified staff and staff that do not need to become certified.

VOLUNTEER RISK AND PROGRAM MANAGEMENT (VRPM)

Using volunteers to assist with SHIP work is a practice that ACL strongly encourages. Many SHIP programs use a significant number of volunteers for tasks ranging from counseling to data entry. Volunteers are required to be trained, like any other SHIP staff, according to the Certification and Recertification Guidelines. Each AAA has a few volunteers, but we have far fewer volunteers than most SHIPs. This is attributable to a couple of factors, including the small volunteer pool we have in Vermont, difficulty recruiting and retaining volunteers who want to devote the time necessary to be trained to be a SHIP counselor, and lack of staff time to train and supervise volunteers.

Regardless of how many volunteers a SHIP program has or what their duties are, ACL requires every SHIP program to implement policies that follow the ACL mandated VRPM policies. Our Volunteer Policies and Procedures are implemented by each AAA.

ACCESS TO SAMS, STARS, CTM, SHIP TA CENTER, 1-800 MEDICARE

SAMS

SAMS is the data base AAAs use to record SHIP data on the Beneficiary Contacts, Group Outreach and Education, and Media Outreach and Education forms. AAAs use SAMS for other programs as well.

STARS

STARS is the national SHIP database. SHIP data that is entered in SAMS is transferred to STARS in real time. The SHIP Director or authorized AAA staff enters SHIP staff in STARS. This generates an eFile ID which must be entered in SAMS. Staff who need to go into the STARS data base itself need a user name and password, called credentials. These are sent from STARS by the SHIP Director or authorized AAA staff. Credentials are necessary to run searches and edit any forms that have been transferred from SAMS to STARS.

See STARS section, page 4.

STARS Log In:

<https://acl.entellitrak.com/etk-hhs-acl-prod/login.request.do>

STARS resources and job aids:

<https://acl.entellitrak.com/etk-hhs-acl-prod/page.request.do?page=page.starshome>

CMS Unique ID (Center for Medicare and Medicaid Services)

The CMS Unique ID is used to gain access to SHIP line at 1-800 Medicare. CMS Unique IDs are requested by SHIP Directors through STARS. Only SHIP Directors can approve and deny CMS Unique ID requests.

CTM- Complaint Tracking Module is the complaint tracking data base CMS uses to monitor Part D and Medicare Advantage Plan complaints. The CTM Standard Operating Procedures (SOP) include instructions on applying for access from CMS. Access is usually granted for SHIP Coordinators only.

CTM is not meant to replace contacting the Part D plan to resolve complaints. CMS requires security awareness training, annual recertification, and states clearly that under no circumstances will access to CTM be shared among users.

SHIP Technical Assistance Center

Staff doing SHIP work should request access to the SHIP TA Center website:

<https://www.shiptacenter.org/>

The SHIP director then approves access once it is requested.

The TA Center has a resource library with many good resources related to Medicare and SHIP. It offers frequent webinars on subjects related to Medicare and SHIP work, which are recorded and posted on the website. It also offers a dedicated email address for specific Medicare questions and assistance with cases.

Assigning Access

Most AAAs use I & A and other staff to do some SHIP work. The following guidelines for determining access to the various data bases and resources are to help ensure that SHIP data is entered correctly and all our SHIP work is recorded as accurately and completely as possible, as well as to ensure access to materials and resources relevant to SHIP work. Contact the SHIP Director for assistance with access to any of these resources.

1. All SHIP Coordinators and paid designated SHIP counselors should have a STARS eFile ID, STARS credentials, and a CMS Unique ID.
2. I & A staff who do work attributed to SHIP and who enter data in SAMS need a STARS eFile ID. Staff should not use their SHIP Coordinator's number.
3. I & A staff who do work attributed to SHIP that includes calling the SHIP 1-800 Medicare number have their own CMS Unique ID and not use the SHIP Coordinator's Unique ID.
4. Only SHIP Coordinators have access to CTM.
5. Volunteers who enter Beneficiary Contact, Media Outreach, and/or Group Outreach forms for themselves or others need a STARS eFile ID. They should not use anyone else's number.
6. AAA staff doing SHIP work, including I & A staff and volunteers, should have access to the resources on the SHIP TA Center website.

RESOURCES and CONTACT INFORMATION

VERMONT AGENCIES/DEPARTMENTS

Department of Vermont Health Access (DVHA)-administers Vermont's health care programs, including Vermont Health Connect
DVHA.Vermont.gov
802-879-5900

PDP Team (Prescription Drug Plan Team at DVHA)
AHS.DVHAPDPTeam@Vermont.gov

Maximus
Member Services for both Vermont Health Connect and Green Mountain Care
Assistor Line: 855-554-4488

Vermont Health Connect—Vermont's Health Insurance Exchange. Provides coverage through MAGI/Expanded Medicaid, private plans
<https://portal.healthconnect.vermont.gov>
888-899-9600

Navigators and Assistors for Vermont Health Connect Coverage
Are trained by DVHA to assist Vermonters with applying for coverage through Vermont Health Connect and Green Mountain Care

http://info.healthconnect.vermont.gov/sites/hcexchange/files/images/2015_newimages/In%20Person%20Assister%20Directory%202018.pdf

Green Mountain Care
Umbrella name for these Vermont health care programs: Medicaid for Aged, Blind, Disabled (MABD), long term care Medicaid, VPharm, and the Medicare Savings Programs (MSPs)
<http://www.greenmountaincare.org>
800-260-8427

Department of Disabilities, Aging and Independent Living (DAIL)
Administers programs for disabled and older Vermonters
DAIL.vermont.gov

Department of Financial Regulation (DFR)
State agency responsible for regulating and licensing private insurance companies, including Medicare Supplemental policies
DFR.Vermont.gov
Dfr.insuranceinfo@vermont.gov
802-828-3302/800-964-1784 Consumer Assistance Line

FEDERAL AGENCIES/DEPARTMENTS

Social Security Administration

Administers benefits for retirees and disabled individuals, and has a role in administering Medicare enrollment.

SSA.gov

800-772-1213

Medicare.gov

Official website for Medicare

1-800 Medicare-customer service for Medicare.

888-647-6701 SHIP Line, need Unique ID

Center for Medicare and Medicaid Services (CMS)

Federal agency administering Medicare and Medicaid, and regulating Part D and Medicare Advantage plans. Our regional office in Boston:

Jennifer Syria Jennifer.Syria@CMS.HHS.gov (general Medicare issues)

Cheryl Cipolla Cheryl.Cipolla@CMS.HHS.gov (Part D and Medicare Advantage complaints and issues)

SHIP TA Center

Technical assistance resource for SHIP programs. It provides resources through its website, as well as Medicare training, SHIP certification, and assistance with Medicare questions and cases.

www.shiptacenter.org

ORGANIZATIONS THAT PROVIDE LEGAL AND TECHNICAL ASSISTANCE TO SHIP AND BENEFICIARIES

Health Care Advocates Office

A project of Vermont Legal Aid that assists and advocates for Vermonters on issues related to health insurance, including Medicaid, Medicare, Medicare Savings Programs, commercial insurance

800-917-7787

Vtlegalaid.org

Justice in Aging

National legal non-profit agency that provides advocacy, litigation, trainings and resources to local advocates to ensure access to the social safety net programs that older individuals depend on, including Medicare, Medicaid, Social Security, and Supplemental Security Income (SSI).

<http://www.justiceinaging.org/>

Medicare Rights Center

National non-profit that advocates for access to affordable health care. It provides education and training materials on Medicare.

www.medicarerights.org

Center for Medicare Advocacy

National nonprofit law center that provides education, advocacy and legal assistance for Medicare beneficiaries

<http://www.medicareadvocacy.org/>

National Council on Aging (NCOA)

Provides education/training on Medicare as well as advocacy for beneficiaries specifically related to low income beneficiaries. It serves as the technical assistance for MIPPA.

<https://www.ncoa.org/>

SHIP TA Center

Technical assistance resource for SHIP programs. It provides resources through its website, as well as Medicare training, SHIP certification, and assistance with Medicare questions and cases.

www.shiptacenter.org

Congressional Delegation

Senator Bernard Sanders 802-862-0697/800-339-9834

Senator Patrick Leahy 802-863-2525

Congressman Peter Welch 802-652-2450/888-605-7270

RESOURCES THAT ASSIST BENEFICIARIES WITH COST OF CARE

FQHCs-Federally Qualifying Health Centers

<http://www.dlp.vermont.gov/other/federal-clinics>

Needy Meds-Patient Assistance Programs listings

<https://www.needymeds.org/>

MANUALS/RULES/REGULATIONS

VPharm Regulations

<http://humanservices.vermont.gov/on-line-rules/esd-health-related/vpharm-5400>

Vermont Health Care Program Regulations

<http://humanservices.vermont.gov/on-line-rules/hbee/adopted-rules>

Medicare Internet Manuals

<https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/Internet-Only-Manuals-IOMs.html>

Medicare and Medicaid Laws

https://www.ssa.gov/OP_Home/ssact/title18/1800.htm

https://www.ssa.gov/OP_Home/ssact/title19/1900.htm

