SECTION 1000

SENIOR HEALTH ASSISTANCE PROGRAM

SECTION 1000 INDEX

SECTION 1000: SENIOR HEALTH ASSISTANCE PROGRAM (SHAP)

1001: <u>Introduction</u>

Senior Information Service providers will be the only providers reporting Senior Health Assistance Program (SHAP). The following SHAP activities must be reported in ClientTracker:

1. SHAP Information and Assistance (S12);
2. SHAP Counseling (S13);
3. SHAP Outreach Visits (S14);
4. Completion and submission of Social Security Low Income Subsidy Form (S15);
5. Community Events Conducted (S16);
6. Completion and submission of Medicare Part D Drug Plan Enrollment (S17);
7. Completion and submission of CB/IL Cares Rx and other State Pharmaceutical Assistance Applications (S18); and,
8. Education & Training sessions conducted for older adults, family caregivers, and the general public on Medicare Part D and State Pharmaceutical Assistance Programs (S19).
9. Completion and Submission of Medicare Savings Program Application (MIPPA) (S20).

1002: <u>SHAP Information and Assistance Services (S12)</u>

1. Client Definition: older adults and others (e.g. persons with disabilities under the age of 60 who receive basic information on Medicare Part D, Low Income Subsidy (LIS), and state pharmaceutical assistance programs. The service may be initiated by an older person, caregiver or SHAP service provider. Information and assistance services refer to individual one-on-one contacts by phone, e-mail, or face-to-face between a SHAP service provider and an eligible participant for family caregiver.

2. Unit Definition: individual client contact made for information, referral or assistance relating to general basic questions (e.g., application and enrollment due dates, status of CB/IL Cares Rx applications, providing a

3.   copy of the application about state pharmaceutical assistance programs, Medicare Part D and LIS). More labor intensive service activities (e.g. assisting in completing the application, etc.) should be classified as a SHAP counseling service. Subsequent contacts pertaining to the same subject should be entered under the Counseling definition.

4.   ClientTracker Data Entry Procedures: Preferred method of ClientTracker data entry is to authorize individual clients for this service. If the contact is anonymous or for other reasons individually identifiable data is not available, clients can be entered through the bulk demographic method.

   a.   Refer to Section 400 to **Register Clients**; and/or
   b.   Refer to Section 600 for **Enter Units/Bulk Data** procedures.

   NOTE: Based on the unit definition (one client per fiscal year), number of clients and units will be identical for SHAP Information & Assistance.

5.   Once the SHAP Information & Assistance Services data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 – ClientTracker Quarterly Procedures.

1003:   <u>SHAP Counseling Services (S13)</u>

1.   Client Definition: older adults and others (e.g. persons with disabilities under the age of 60) who receive assistance with issues related to Medicare Part D and state pharmaceutical assistance programs. Counseling services are individual one-on-one contacts (by phone, e-mail, or face-to-face) between a SHAP service provider and an eligible participant or family caregiver, but are not limited to: screening to decide whether individuals qualify for pharmaceutical assistance programs, discussing how to fill out applications or enrollment forms, comparing Medicare Part D drug plans, and/or making follow-up phone calls (e.g. problems with a Medicare D drug plan, etc.)

2.   Unit Definition: One unit for each SHAP counseling session. One client may have multiple units under this service. Example: client calls on Monday for status of CB application (one unit of counseling), the same clients on Wednesday for help interpreting the letter received from the Part D plan (one unit of counseling), the same client calls on Friday to report receiving IL Cares Rx card and asks you to initiate wrap coverage (one unit of counseling). This same client has just received three units of counseling in ClientTracker.

3. ClientTracker Data Entry Procedures: Required method of entering client demographic data is to authorize individual client for this service. Refer to Section 400 to **Register Clients**. NOTE: each one-on-one contact with a SHAP client must be authorized as EITHER an information and assistance OR counseling contact. One contact cannot be authorized as both information and assistance counseling activity. The required service unit data entry method is to report service units by client. Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

1004: <u>SHAP Outreach Visits (S14)</u>

1. Client Definition: older adults and others (e.g. person with disabilities under the age of 60) who received pharmaceutical assistance program (e.g. Part D, LIS, IL Cares Rx, etc.) information on a one-to-one basis via a contact **initiated by the agency.**

2. Unit Definition: One client contact, initiated by the agency. Subsequent contacts pertaining to the same subject are included in the original unit of SHAP Outreach service. NOTE: Based on the unit definition (one client contact per fiscal year), numbers of clients and units will be identical for this service.

3. Data Entry Procedures: Required method of entering client demographic data is to authorize individual client for this service. Refer to Section 400 to Register Clients. The required service unit data entry method is to report service units by client. Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

4. Once the SHAP Outreach Service data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 – **ClientTracker Quarterly** Procedures.

1005: <u>Completion and Submission of Social Security Low Income Subsidy Form (S15)</u>

1. Client Definition: older adults and others (e.g. person with disabilities under the age of 60) for whom a Social Security Low Income Subsidy (extra help) form has been completed and submitted either online or on paper. Contact may be face-to-face or by phone and may be initiated by the agency or the client/authorized other.

2. Unit Definition: completed and submitted form (this will usually be one form per fiscal year). Numbers of clients and units will be identical for this service.

10-3

3. ClientTracker Data Entry Procedures: Required method of entering client demographic data is to authorize individual client for this service. Refer to

4. Section 400 to **Register Clients**. The required service unit data entry method is to report service units by client. Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

5. Once the completion and submission of SS LIS form data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 **ClientTracker Quarterly Procedures**.

1006:   Community Events Conducted (S16)

1. Client Definition: estimate of potential clients (or their caregivers) contacted during a community event such as health fairs, senior fairs, legislative enrollment events, etc., to encourage their use of existing services.

2. Unit Definition: each community event conducted is one unit. It does not include program publicity and/or presentations to groups. Service provision to groups should be included as educational programs.

3. ClientTracker Data Entry Procedures: Required method to enter client and unit data is by bulk. . Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

4. Once community events conducted data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 – **ClientTracker Quarterly Procedures**.

1007:   Completion and Submission of Medicare Part D Drug Plan Enrollment (S17)

1. Client Definition: older adults and others (e.g. person with disabilities under the age of 60) for whom a Medicare Part D Plan application has been completed and submitted on line, by phone, or on paper. Contact may be face-to-face or by phone and may be initiated by the agency or the client/authorized others.

2. Unit Definition: completed and submitted application (this will usually by one application per fiscal year). Numbers of clients and units will be identical for this service.

3. ClientTracker Data Entry Procedures: Required method of entering client demographic data is to authorize individual client for this service. Refer to

4.   Section 400 to **Register Clients**. The required service unit data entry method is to report service units by client. Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

5. Once the completion and submission of Medicare Part D Drug Plan Enrollment data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 – **ClientTracker Quarterly Review** procedures.

1008:   Completion and Submission of CB/IL Cares Rx & Other State Pharmaceutical Assistance Applications (S18)

1. Client Definition: older adults and others (e.g. person with disabilities under the age of 60) for whom a CB/IL Cares Rx and Other State Pharmaceutical Assistance Application has been completed and submitted on line, by phone, or on paper. Contact may be face-to-face or by phone and may be initiated by the agency or the client/authorized other. Required method of data entry is to authorize individual clients for this service. Subsequent contacts pertaining to the application should be authorized as SHAP Counseling.

2. Unit Definition: completed and submitted application (this will usually be one application per fiscal year). Number of clients and units will be identical for this service.

3. ClientTracker Data Entry Procedures: Required method of entering client demographic data is to authorize individual client for this service. Refer to Section 400 to **Register Clients**. The required service unit data entry method is to report service units by client. Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

4. Once the completion and submission of CB/IL Cares Rx & Other State Pharmaceutical Assistance Applications data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 – **ClientTracker Quarterly Review** Procedures.

1009:   Education & Training Sessions Conducted for Older Adults, Family Caregivers and the General Public on Medicare Part D and State Pharmaceutical Assistance Programs (S19)

1.   Client Definition: older adults, caregivers, and others (e.g. person with disabilities under the age of 60) in a group setting.

2.   Unit Definition: each education program or training session organized and/or conducted is one unit.

3.   ClientTracker Data Entry Procedures: Preferred method of ClientTracker demographic data entry is to authorize individual clients for this service. However, participants of education and training sessions can be reported in bulk. Please refer to Section 400 to **Register Clients**. Service units are to be reported in bulk. Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

4.   Once the education and training sessions data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 – ClientTracker Quarterly Procedures.

1010:   Completion and Submission of Medicare Savings Program Applications: Medicare Savings Program defined as: Qualified Medicare Beneficiary (QMB); Specified Low-Income Medicare Beneficiary (SLMB); Qualifying Individual (QI); Qualified Disables and Working Individuals (QDWI) (S20).

1.   Client Definition: older adults and others (e.g. person with disabilities under the age of 60) for whom a Medicare Savings Program Application has been completed and submitted on line, by phone, or on paper. Contact may be face-to-face or by phone and may be initiated by the agency or the client/authorized other. Required method of data entry is to authorize individual clients for this service. Subsequent contacts pertaining to the application should be authorized as SHAP Counseling.

2.   Unit Definition: completed and submitted application (this will usually be one application per fiscal year). Number of clients and units will be identical for this service.

3.   ClientTracker Data Entry Procedures: Required method of entering client demographic data is to authorize individual client for this service. Refer to Section 400 to **Register Clients**. The required service unit data entry method is to report service units by client. Please refer to Section 600 for **Enter Units/Bulk Data** procedures.

4.   Once the completion and submission of Medicare Savings Programs data has been entered, you will need to compare your internal YTD totals with ClientTracker YTD totals. Refer to Section 1500 – **ClientTracker Quarterly Review** Procedures.