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# Indiana SMP Volunteer Packet

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## SMP Volunteer Handbook

section 2





# **Indiana Senior Medicare Patrol**

## **2019 - 2020**

# **Volunteer Handbook**

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## **Welcome and thank you from ACL**

On behalf of the U.S. Administration for Community Living (ACL), we want to welcome you to the SMP volunteer program and thank you for volunteering in the effort to empower and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, errors, and abuse.

In recent years, ACL's partners in this effort—the Centers for Medicare & Medicaid Services (CMS), the HHS Office of the Inspector General, and the Department of Justice, including the FBI—have created the resources needed—including sophisticated technology and skilled local investigative and enforcement teams—to identify and prosecute criminals who steal hundreds of millions of dollars each year from Medicare and related health insurance programs. That is important work.

But in the end, we can't forget that no law or technology is as effective at preventing fraud as educated and informed consumers. Tips from Medicare beneficiaries helped take down a fraud scheme in Miami involving false claims for community mental health services. The investigation ultimately led to a judgment of \$3.8 million and a recovery of \$1.6 million against the defendants, including one who was sentenced to 3 years in prison and 3 years' probation.

Those tips likely would never have been made without the extensive outreach and educational efforts of the Florida Senior Medicare Patrol – the same outreach and educational work that you and other SMP volunteers in your state are being trained to do or to support. Preventing fraud takes a lot of time, preparation and hard work. It's people like you who bear a heavy part of that load – without always seeing the most direct or obvious rewards.

Sometimes your efforts may result in a big takedown, but more often than not, you will be preventing fraud before it ever takes place. That can be a hard thing to measure, but the benefits for Medicare and America's seniors and people with disabilities are enormous. Since 1965, Medicare has been one of our country's greatest success stories. We have a responsibility to keep it strong for generations to come. And we can't do that without you. Thank you for volunteering with the SMP.

Sincerely,

Rebecca Kinney and Josh Hodges

Administration for Community Living

## History of the SMP Program

In 1995, the Administration on Aging (AoA) became a partner in a government-led effort to fight fraud, errors, and abuse in the Medicare and Medicaid programs through a ground-breaking demonstration project called Operation Restore Trust (ORT). ORT's purpose was to coordinate and target federal, state, local, and private resources on those areas most plagued by abuse. Operation Restore Trust was announced at the 1995 White House Conference on Aging. The initiative focused on five states where fraud and abuse was most prevalent: California, Florida, Illinois, New York, and Texas.

ORT brought together several agencies within the federal Department of Health and Human Services, including the Health Care Financing Administration (now the Centers for Medicare & Medicaid Services or CMS), the Office of Inspector General and the Administration on Aging, to fight health care fraud, waste, and abuse. These agencies also worked with partners in law enforcement such as the federal Department of Justice and state and local authorities.

In 1996, Congress enacted the Health Insurance Portability and Accountability Act (HIPAA) of 1996 (P.L. 104-191). Although HIPAA is best known for rules that protect patient confidentiality, the law also created the Health Care Fraud and Abuse Control (HCFAC) program and authorized funding for AoA to support the effective training and mobilization of senior volunteers who provide consumer education to beneficiaries.

Another law enacted in that same session of Congress—the Omnibus Consolidated Appropriations Act of 1997 (P.L. 104-208)—affirmed AoA's role as a key partner in the fight against health care fraud by establishing the program that would come to be called the Senior Medicare Patrol program in 12 local demonstration projects. Senator Tom Harkin (D-IA) offered legislative language that directed the AoA to form projects that would recruit and train retired doctors, nurses, and other professionals to identify and report errors, fraud, and abuse.

A Senate Report explained the rationale for the newly created program by saying, “senior citizens are our best front line defense against these losses [from health care fraud and abuse], but they don't have the information and experience needed” to recognize and accurately report cases of errors, fraud, and abuse. The Senior Medicare Patrol would address this problem through volunteers who provide *consumer education* which is, along with provider education, one of the five primary purposes that the HIPAA lists as an authorized use of HCFAC funding.

As a result of this Congressional action, SMP volunteers are now at work in all fifty states, the District of Columbia, Puerto Rico, Guam, and the Virgin Islands. They teach their peers to protect themselves against fraud, safeguard Medicare numbers, and examine Medicare Summary Notices and other documents to detect discrepancies and report suspicious activity. Allocations through the Older Americans Act and the HCFAC program help fund SMP program operations.

**SMP Program Milestones**

- 1995 – Operation Restore Trust (ORT) brings together the Administration on Aging and other federal agencies in a coordinated effort to fight Medicare and Medicaid fraud, waste, and abuse.
- 1997 – Omnibus Consolidated Appropriations Act establishes 12 demonstration projects to “utilize the skills and expertise of retired professionals in identifying and reporting errors, fraud, and abuse.” HIPAA provides Health Care Fraud & Abuse Control program funding to AoA for consumer education.
- 1998 - In the program’s first year, more than 3,600 volunteers delivered 1,300 education and counseling sessions that reached 41,000 people. AoA increases the number of cooperative agreements for the program from 12 to 18.
- 2002 - AoA convenes its first National Health Care Fraud and Abuse Control Program Conference in Washington, D.C. Its purpose is to share successful practices, strengthen collaboration between federal, state, and local partners, and honor outstanding senior volunteers. 51 Senior Medicare Patrol (SMP) projects, located in 45 states plus the District of Columbia and Puerto Rico, are in operation.
- 2003 – AoA convenes three regional Health Care Fraud and Abuse Control Program Conferences in the DC area, Dallas, and Seattle. The SMP program has projects in all 50 states, the District of Columbia, and Puerto Rico.
- 2004 – SMP projects refer 1,700 cases to Medicare contractors for follow-up.
- 2007 – SMART FACTS reporting system launches and AoA introduces a national SMP logo and outreach materials.
- 2008 – Together with the National Hispanic Council on Aging, AoA establishes the National Hispanic SMP project to focus education and outreach efforts on Spanish speaking communities in south Florida and Texas.
- 2010 – The Department of Health & Human Services, through AoA, launches a national public awareness campaign about Senior Medicare Patrol with Fraud Prevention Public Service Announcements (PSAs), fact sheets, and other information resources. AoA provides media toolkits, training, and support to the SMPs to ensure effective placement and response to the PSAs. Also, SMPs receive special capacity building grants enabling many to hire Coordinators of Volunteers.
- 2011 – Working with volunteer management consultant Linda Graff and Associates, AoA and the SMP Resource Center disseminate a comprehensive set of new volunteer risk and program management policies that will take effect in stages over three years, beginning in June 2013.
- 2012 – April 16, 2012 – the Administration on Aging (AoA), the Administration on Intellectual and Developmental Disabilities (AIDD), and the HHS Office on Disability come together to become the Administration on Community Living (ACL).

## What is the SMP program?

**What do SMPs do?** The SMP program, also known as Senior Medicare Patrol program, helps Medicare and dually eligible Medicare-Medicaid beneficiaries avoid, detect, and prevent health care fraud. In doing so, they help protect older persons and promote integrity in the Medicare program. Because this work often requires face-to-face contact to be most effective, SMPs recruit volunteers nationwide to support this effort. SMP volunteers serve in many ways, including outreach, education, and one-on-one counseling. Most are Medicare beneficiaries themselves and are thus well-positioned to assist their peers.

SMP staff, including paid staff and volunteers, conduct outreach to Medicare beneficiaries in their communities through group presentations, exhibiting at community events, answering calls to SMP helplines, and meeting individually with clients. Their main goal is to teach Medicare beneficiaries how to:

- Protect their personal identity
- Identify and report errors on their health care bills, and
- Identify deceptive health care practices, such as illegal marketing, providing unnecessary or inappropriate services, and charging for services that were never provided.

In some cases, SMPs do more than educate. When Medicare beneficiaries cannot act on their own behalf to address these problems, the SMPs work with beneficiaries, family caregivers, and others to address the problems, and if necessary, make referrals to outside organizations that can intervene.

**How do SMPs Work?** The Administration for Community Living (ACL) provides funding through the Older Americans Act for the SMP projects.

SMP projects operate in all fifty states, Guam, Puerto Rico, the Virgin Islands, and the District of Columbia. At the state and local levels, SMPs rely on hundreds of partnerships with host organizations that include Area Agencies on Aging, faith-based organizations, and State Health Insurance Assistance Programs (SHIPs), to help achieve the program's goals. Paid staff members at host organizations sometimes are responsible for recruiting and supervising SMP volunteers. SMP projects receive technical assistance and training from the Senior Medicare Patrol National Resource Center (The Center) based in Waterloo, Iowa. An additional \$3.312 million in HCFAC funds supported infrastructure and other support and capacity building activities for the SMP projects, including the SMP Resource Center.

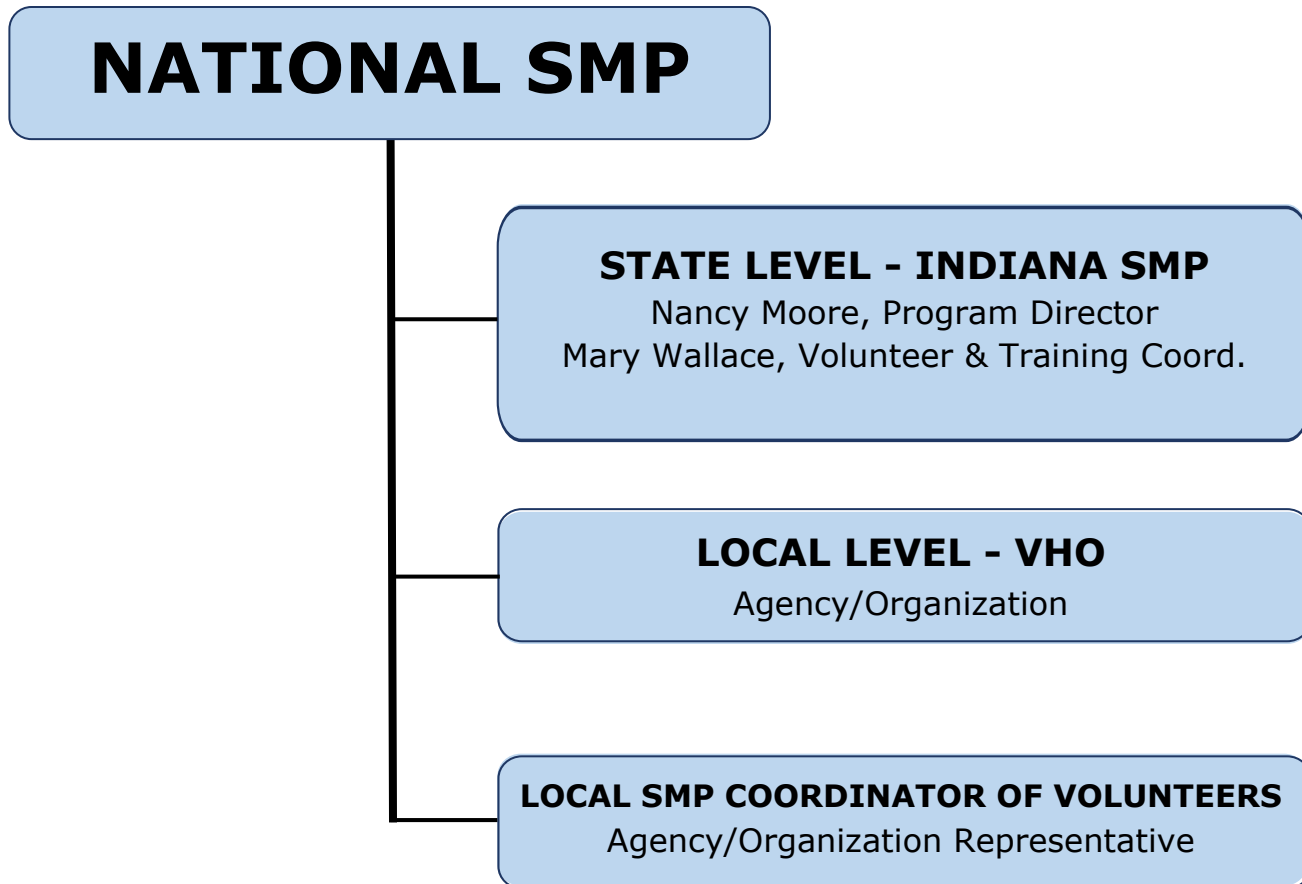
SMP activities support ACL's broader goals of promoting increased choice and greater independence among older adults. The activities of the SMP program also serve to enhance the financial, emotional, physical and mental well-being of older adults -- thereby increasing their capacity to maintain security and independence in retirement and to make better financial and health care choices.

In Indiana, SMP operates in partnership with the Indiana Association of Area Agencies on Aging and other Senior Service Agencies through partnership agreements. These *Memorandums of Understanding* (MOUs) are contractual agreements between the State SMP Office and local partners or *Volunteer Host Organizations* (VHO).

Although there is no formal organizational structure, the following provides a basic overview of the organizational flow of matters pertaining to SMP operations.



## Organizational Structure



## General Information

### IN SMP State Office Contact Info

#### **Indiana Senior Medicare Patrol**

#### **Indiana Association of Area Agencies on Aging**

4701 N. Keystone, Suite 402

Indianapolis, IN 46205

(317) 205-9201

[www.IndianaSMP.org](http://www.IndianaSMP.org)

[www.facebook.com/INSMP](https://www.facebook.com/INSMP)

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## Abbreviations and Acronyms

- ACL:** The Administration for Community Living, an operating division within the federal Department of Health and Human Services with headquarters in Washington, DC and regional offices in ten cities.
- AoA:** The Administration on Aging, an agency within the Administration for Community Living, administers all programs funded by the Older Americans Act, including SMP.
- AAA:** An Area Agency on Aging is responsible for planning and delivery of services under the Older Americans Act for a geographic region within a state.
- CMS:** The Centers for Medicare & Medicaid Services (CMS) administers the Medicare program and oversees state administration of the Medicaid programs. The Center for Program Integrity (CPI) is a bureau within CMS that works with various contractors to identify potential fraud, waste and abuse in the original, fee-for-service Medicare program. The Center for Medicare is responsible for overseeing the Medicare Advantage (Part C) and Medicare Prescription Drug (Part D) programs. An Administrator appointed by the Secretary of HHS heads CMS.
- HHS:** The Department of Health & Human Services is one of two departments within the executive branch of the federal government responsible for administering the Health Care Fraud & Abuse Control (HCFAC) program of which the Medicare Integrity Program (MIP) is a part. The Administration for Community Living (ACL), the Centers for Medicare & Medicaid Services (CMS) and the HHS Office of the Inspector General (OIG) are units within HHS. The Secretary of HHS holds a cabinet-level position.
- DoJ:** The Department of Justice is the other federal department that administers the HCFAC program. The Federal Bureau of Investigation, an agency within the DoJ, works with the HHS Office of Inspector General (OIG) to investigate health care fraud and apprehend alleged perpetrators. The DoJ's U.S. Attorney offices throughout the country prosecute criminal health care fraud cases.
- OIG:** The HHS Office of Inspector General investigates Medicare and Medicaid fraud, and refers criminal cases for prosecution to the U.S. Attorney offices. The OIG has authority to issue civil monetary penalties and exclude providers from the Medicare and Medicaid programs.
- SHIP:** The State Health Insurance Assistance Programs provide counseling services to Medicare beneficiaries and assist them in applying for assistance programs, comparing and choosing health and drug plans, and appealing claims denials.
- SMP:** The Senior Medicare Patrols empower and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, errors, and abuse through outreach, counseling, and education.

## **SMP Volunteer Risk and Program Management (VRPM) Policies**

A comprehensive set of risk and program management policies guide the operation of the SMP volunteer program. The policies resulted from a project that began in 2010 to assess and identify the risks involved in the operation of the SMP volunteer program, and to provide guidance and resources to program managers to help them manage the identified risks. Implementation of the SMP Volunteer Risk and Program Management (VRPM) was completed at the end of 2014 and updated in 2016. The Administration on Aging (AoA) initiated the VRPM project with these factors in mind:

- Growth of the SMP programs
- Increased awareness about risks related to volunteer involvement, for example, with volunteers who have access to sensitive personal information
- The need to adapt to a changing environment for volunteering in which volunteers assume responsibility for challenging and responsible tasks
- The SMP program's higher profile in the media
- Expectations in the courts and public opinion for high standards and greater accountability in volunteer programs

The primary purpose for the VRPM project, and the development of a comprehensive set of risk and program management policies, is to enable SMP programs to manage their volunteer programs more safely, effectively, and productively. Safety is a concern for both volunteers and the people—many of who are vulnerable seniors—who benefit from SMP services. The VRPM project also promotes effectiveness by setting a high standard of care in regard to volunteer services. The creation of national standards for this important area of program operations will enhance the program's results.

As an SMP volunteer, you have an obligation to know and understand the policies and how they affect you. Your supervisor and other SMP staff will refer to the policies as they manage you and the other volunteers in the program. Among other things, these policies address...

- Definitions of key terms
- Volunteer role classifications and position descriptions
- Risk management and insurance requirements
- Incident reporting and response procedures
- Volunteer rights and responsibilities
- Coordinator of volunteers role
- Screening procedures

- Orientation and training
- Performance management
- Boundaries and ethics, including relationships with beneficiaries
- Confidentiality
- Grievances and complaints
- Recognition
- Information and data security, and
- Much more

This handbook contains information about some of the policies that most interest volunteers - such as Volunteer Roles, Rights and Responsibilities, Orientation and Training, Screening, Dismissals, and Complaints and Grievances. If you would like to see the complete set of SMP VRPM policies, ask your supervisor or coordinator of volunteers.

One thing to keep in mind is that the SMP volunteer risk and program management policies apply to all state and local organizations, also called “host organizations,” that recruit and retain volunteers to perform SMP duties, and to all the SMP volunteers who work under them. In some cases, host organizations may have volunteer policies in place in addition to the SMP policies. If you find that the different policies are in conflict or are causing confusion, please discuss the problem with your supervisor and/or the SMP coordinator of volunteers.

## Volunteer Roles

The SMP program operates with six standard volunteer roles. State and local programs may create additional roles to meet specific volunteer program and community needs. Information about the roles and the responsibilities connected with them are set forth in position descriptions. SMPs may create position descriptions that combine elements of the standard roles. A position, for example, may combine the “staffing exhibits” and “making group presentations” roles below into a position called “outreach volunteer.” SMP program managers should give you a copy of a position description that describes the purpose, duties, and qualifications for the role(s) in which you have agreed to serve.

The six standard SMP volunteer roles are:

- Assisting with administration: This role involves such work as copying, filing, data entry, and placing outbound phone calls in support of SMP activity
- Distributing information: This role involves transporting and disseminating SMP information materials to sites and events, and may include presenting prepared copy or performing scripted activities for small groups.
- Staffing exhibits: This role involves staffing information kiosks or exhibits at events such as health fairs. Volunteers who staff exhibits provide general information about SMP to the public and answer simple inquiries.
- Making group presentations: This role involves giving substantive presentations on SMP topics to small and large groups, with the opportunity for interaction with the audience during time set aside for Q & A and discussion.
- Counseling: This role involves direct discussion with beneficiaries, caregivers, and/or family members about their individual situations and may include review of personal information such as Medicare Summary Notices, billing statements, and other related financial and health documents.
- Handling complex issues and referrals: This role involves in-depth interactions with beneficiaries, caregivers, and/or family members who are reporting specific instances of health care fraud, errors, and abuse. Volunteers who serve in this role may act on behalf of a beneficiary to correct an error or refer suspected fraud and abuse to the appropriate authorities.

The SMP considers four roles—staffing exhibits, making group presentations, counseling, and handling complex issues and referrals—to be “positions of trust.” This means that the roles involve access to beneficiaries or other vulnerable people, personal or confidential information, or to money or other valuables. The four positions of trust are subject to more rigorous screening procedures and training than the roles involving administration and information distribution. If you decide to transfer from one role to another, please keep in mind that you may be required to undergo a more intensive screening process and training to qualify for placement in the new role.

The SMP asks volunteers to confine their activities to those tasks and responsibilities described in the position description for their specific role(s). Each volunteer role has responsibilities as well as limits to those responsibilities. A volunteer who is trained to make group presentations, for example, should not handle complex issues and referrals unless she or he formally qualified for that role after completing any required screening procedures and training. **For more details about volunteer roles, see complete descriptions in the Appendix.**

## **Rights and Responsibilities**

SMP program volunteers have certain rights and responsibilities that are good to keep in mind during the course of your volunteer service. Because the program's leadership sees volunteers as a valuable resource to the program and the communities it serves, volunteers have rights, for example, to meaningful work, support, and recognition for the work they do.

At the same time, the SMP program expects volunteers to perform their duties to the best of their abilities, to comply with the program's volunteer policies, and to remain loyal to the program's values, goals, and procedures. Volunteers serve at the sole discretion of the SMP program, and agree that the SMP may decide to end a volunteer's relationship with the SMP or to change the nature of the volunteer's assignment when appropriate.

As an SMP volunteer, you have a right to:

- Receive meaningful work assignments
- Treatment as an equal co-worker
- A safe work environment
- A respectful work environment free of harassment
- Receive orientation and training
- Receive effective supervision
- Receive constructive feedback on a regular basis
- Receive informal and formal recognition
- Receive clear information about the boundaries for the work you are to do and not to do (see the position description for your volunteer role)
- Receive all the pertinent information you need to perform your work assignments
- Refuse any tasks or work assignments, especially when the assignment requires you to do something for which you have not been trained
- Security and confidentiality for the records in your personnel file
- Examine the contents of your personnel file
- Make complaints and file grievances
- Resign from your volunteer service at any time

**As an SMP Volunteer, you have a responsibility to:**

- Provide SMP services responsibly and objectively, without regard to the background or characteristics of the beneficiaries or clients or with favoritism to specific services, providers, or products
- Represent the SMP program only to the extent that your position description and role specifically authorize, and not to present yourself as a spokesperson for the SMP program in a formal sense
- Use your affiliation only in the interests of the SMP program, and not to promote religious or political beliefs or personal business dealings
- Inform your supervisor of any conflicts of interest that may arise after placement in your volunteer position
- Report any abuse that you may witness involving the program's beneficiaries or clients
- Report incidents such as accidents, injuries, errors, and the like to your supervisor
- Report on your volunteer activities on a timely basis
- Protect the confidentiality of the program's beneficiaries and/or clients
- Follow procedures to ensure the security of clients' electronic and hard copy data
- Report changes in your health status or medical treatment that might adversely affect your performance to your supervisor
- Notify your supervisor of absences that will prevent you from performing an assigned task
- Complete required training programs, including continuing education programs

The list above shows many, but not all, of the rights and responsibilities for SMP program volunteers. For the specific policy language on these and other rights and responsibilities, see the volunteer rights and responsibilities in the Appendix.

Here are some examples that we hope will help clarify some of these responsibilities.

**Representing the SMP** - Volunteers who are trained to make group presentations are authorized to discuss, and answer questions about, approved SMP education programs. In that limited capacity, they are free to identify themselves as being affiliated with the SMP. They should not, however, hold themselves out as public spokespersons for the program in connection with media inquiries or questions related to official policy positions.

As a representative of the SMP, you are expected to maintain professional standards in all things, including appearance, use of appropriate language, and conduct.



**Reporting Conflicts of Interest** - One concern for SMP program managers is the appearance of an implied endorsement for a volunteer who is known to the community for his or her business and/or political interests. After discussing the circumstances with a volunteer, a program manager may decide that a person who is engaged in health care sales, or who is running for a seat on the city council, is unsuited for making SMP group presentations because of the danger of blurring the lines between the person's volunteer activity and his or her business or personal interest. Please bring any business, political, or personal activity that arises, that may conflict with the mission and goals of the SMP program, to your supervisor's attention.

**Reporting Incidents** - If you are involved in an accident, suffer an injury, experience harassment, or witness abuse of a beneficiary while you are on duty as an SMP volunteer, you have a responsibility to report the incident to your supervisor or the coordinator of volunteers. Complete and submit an incident reporting form (see Appendix) as soon as possible.

**Volunteers Who Drive** - If your volunteer position involves driving a motor vehicle on behalf of the SMP program, you have additional responsibilities to:

- Abide by traffic laws, such as speed limit, seat belt, and cell phone laws, as you carry out your volunteer duties
- Carry liability insurance on your vehicle
- Notify your supervisor or coordinator of volunteers if your insurance coverage lapses
- Notify your supervisor or coordinator of volunteers if your driver's license expires or receives restrictions that limit your ability to carry out your volunteer duties
- Record and report mileage for reimbursement (if applicable)

For more information, see the Insurance section of this document.

## Orientation and Training

Indiana SMP believes it is essential to develop volunteer knowledge and skills to best serve the SMP mission and the people of our communities effectively. Upon SMP accepting a volunteer into service, our aim is to explain, among other topics, the:

- Purpose and values of the SMP
- Nature and operation of the program or activity in which the volunteer will participate
- Purpose, duties, and requirements of the role the volunteer is accepting

With this in mind...

**Within 3 months of accepting a volunteer role with Indiana SMP, individuals are required to complete SMP Foundations Training and Assessment (open book) - passing with a score of 75% or higher - in order for IN SMP to attribute his/her SMP Volunteer hours to his/her Volunteer Host Organization.**

SMP Foundations Training is user-friendly and easily navigated online training that may be done “at your own pace” as long as it is completed within the required time frame. Those completing the online training should allow approximately 3-6 hours to complete the entire online course\*. If a volunteer is unable to complete the course online, a printed version will be provided.

SMP Foundations is an easily navigated national online training program which provides a strong foundation of SMP knowledge in three main content areas:

- SMP Program
- Medicare Basics
- Medicare Fraud, Errors, and Abuse

Additional or alternative training may be customized appropriately and suggested or possibly required at a later date for individual volunteers depending on the SMP Volunteer Roles that he/she is assigned. Generally speaking, a higher level of training is required for volunteers who have access to confidential information or are performing more complex tasks on behalf of SMP. Your local VHO will provide you with specific information as it pertains to you.

**\* Volunteers with existing knowledge of Medicare basics and/or volunteers who have been SHIP-trained are likely going to require considerably less time to complete the online course.**

## SMP Training Program Descriptions

The SMP Resource Center and state SMP programs has a variety of training programs available in the SMP Resource Library ([www.smpresource.org/resourcelibrary](http://www.smpresource.org/resourcelibrary)).

**SMP Foundations Training\*\*:** This training provides SMP volunteers and staff with a foundation of knowledge in three main content areas including the SMP program, Medicare basics, and Medicare fraud and abuse. Both classroom and online training options are available. Participants should allow 3 to 5 hours to complete the entire online course. As of September 2019, Indiana SMP requires all new SMP volunteers to complete SMP Foundations Training and pass the companion assessment with a score of no less than 75%. Training and assessment must be completed within 3 months of accepting SMP Volunteer position.

**SMP Group Education Training:** This training provides presenters of SMP group education sessions with the necessary skills and resources to deliver the SMP message consistently and effectively to Medicare beneficiaries, caregivers and other interested groups.

**SMP Counselor Training:** This training provides SMP counselors with the necessary skills and resources to handle one-on-one counseling sessions and simple inquiries consistently and effectively.

**Complex Issues & Referrals Training:** This training provides SMP staff and volunteers with the necessary skills and resources to handle complex issues and to know when and where a referral should be made.

**SMP Data Reporting System Training:** This training is for SMP staff and volunteers assigned to use the SMP data reporting system, the web-based, nationwide data management tool used by the SMPs to track and report activity related to simple inquiries, complex issues, outreach and education, and volunteer management.

In addition to the formal training programs for the various SMP volunteer roles, volunteers may receive on-the-job training through coaching and feedback of a supervisor or a veteran volunteer mentor. The SMP may also require attendance at periodic continuing education training programs to provide informational updates and/or additional skills training. The SMP encourages volunteers to build their skills through training while serving with the SMP.

**\*\* Denotes IN SMP Required Training**

## Insurance

Your VHO may provide liability and accident insurance for volunteers who are engaged in SMP business. You should discuss this with your coordinator of volunteers and determine how the coverage coordinates with your other insurance plans. SMP volunteers who drive their own vehicles for SMP business are to carry automobile liability insurance policies at their own expense. In the event of an accident or damage while a volunteer is driving her or his own vehicle for SMP work, the volunteer's own automobile insurance coverage comes into play. We encourage you to consult your own insurance agent about your SMP driving activities and to make sure that your coverage provides adequate protection.

**If you accept a volunteer role that involves driving your own vehicle, a program manager will need a copy of your license and automobile insurance which will be added to your personnel file.** Your supervisor will verify that the coverage remains in effect at least annually. If your automobile insurance coverage lapses, please notify your supervisor immediately so that she or he can adjust work assignments as needed.

**As an Indiana SMP Volunteer, if you will be driving – *even if it is only once* - while you are doing work on behalf of SMP, a copy of your valid driver's license and automobile insurance card will be required upon accepting a volunteer role with SMP.**

**Please Note:** This does not include driving to and from your VHO.

## Performance Management

The SMP program's success is measured in terms of outcomes related to public education about fraud, errors, and abuse in Medicare, and to assisting individual beneficiaries in identifying and reporting instances of suspected health care fraud, errors, and abuse. A key expectation in SMP volunteer program management is that program managers will provide the support volunteers need to successfully achieve the program's education and assistance goals. A constructive and success-oriented performance management system is in place to guide supervisors as they work to encourage productive and satisfying volunteer involvement in the SMP program.

**SMP Performance Management System** - The performance management system has three components: supervision, performance evaluation, and corrective action. Each component includes a range of techniques that supervisors can use to promote high performance. The guiding principle of performance management is to match the type and extent of supervisory intervention to the nature of a volunteer's responsibilities and capacity. It provides several avenues to demonstrate support and to acknowledge excellence. Here are some key points about the system's three components:

**Supervision** - The SMP has an obligation to provide supervision and support for the program's volunteers. This means that supervisors have a responsibility to manage the work that volunteers do, and to determine the kind of guidance and support that each volunteer needs. The supervision that you receive as an SMP volunteer should reflect the principle of positive, constructive and success-oriented guidance that underpins the SMP volunteer performance management system. You should expect to receive feedback, consultation, information, and meaningful assignments from your supervisor.

**Performance Evaluation** - Volunteers in the SMP program receive periodic evaluation of their work. This is a more formal process than one finds in a supervisor's day-to-day feedback and provides a more detailed assessment of each volunteer's performance, on-the-job behavior, achievements, and areas for improvement. This process gives you and your supervisor an opportunity to exchange feedback, ideas, and suggestions. Your supervisor will also use the performance evaluation process to update your personnel file, including changes in your volunteer role, contact information, and the like. She or he will document the substance of the performance evaluation and any improvement plans to which you mutually agree and place them in your file.

**Corrective Action** - SMP program managers may take corrective action when a volunteer's behavior is serious enough to require intervention, and when its continuation or repetition is unacceptable. The SMP corrective action process is progressive in that it is oriented toward success rather than focused on failure, and that the degree of intervention matches the nature of the performance or behavior issue, becoming more serious as the unacceptability of the behavior increases or the volunteer's inability to resolve the problem continues.

Corrective action in the SMP program includes a range of interventions that aim to help volunteers make needed improvements when their performance and/or behavior do not meet expectations. Interventions may include additional training, coaching, adjustment of volunteer duties, or reassignment to a different role. In more serious cases, interventions may involve formal disciplinary actions such as warnings, suspensions, and dismissal. If you would like to learn more about the SMP's corrective action process, ask your supervisor for the program's corrective action protocol. For information on dismissals, see the Volunteer Separation section of this document.

**Grievances and Appeals** - A volunteer who has a complaint about, or grievance with, staff, other volunteers, beneficiaries, or partner organizations should communicate the concern to her or his supervisor. If the complaint or grievance involves the volunteer's own supervisor, she or he should convey the concern to the next person in the SMP program's chain of command. The SMP also has an appeals procedure through which a volunteer can request review of a formal corrective action decision, including dismissal. If you have a complaint or grievance, ask your supervisor for information on filing it.

## **Recognition**

The SMP program greatly appreciates the many and varied contributions of its volunteers to the program's success. Program managers recognize and reward volunteer service both formally and informally. Informal recognition may take the form of feedback on the results of a volunteer's work, a thank you note, a birthday card, or an invitation to participate in the decision-making for a project or activity.

The SMP program strives to recognize volunteers for all types of productive service, and not simply for the number of hours they work. We encourage you to identify and nominate other volunteers who may deserve special recognition or awards.

## Volunteer Separation

**Resignation** - Volunteers may resign voluntarily from their service with the SMP program at any time. If you intend to resign, please notify your supervisor as soon as possible.

**Discipline & Dismissal** - The SMP accepts volunteers with the understanding that the volunteers serve at the sole discretion of the SMP. Volunteers who do not follow the rules, policies, and procedures of the SMP program, or who repeatedly fail to perform an assignment satisfactorily despite supervisory support and appropriate interventions, are subject to disciplinary action or dismissal. Involuntary dismissal is typically a last resort, used only when other appropriate steps have been taken. Ideally, the supervisory staff will discuss with a volunteer in advance the reasons for a possible dismissal if other corrective actions do not resolve the problem within a reasonable time frame.

Possible grounds for dismissal are listed below. The list illustrates the range of reasons for dismissal and is not intended to be comprehensive. Grounds for dismissal include:

- Gross misconduct
- Serious misjudgment that may undermine trust in the volunteer or cause harm to others
- Insubordination, including failure or unwillingness to perform essential responsibilities in the volunteer's role or to accept direction from supervisory staff
- Being under the influence of alcohol or illegal drugs while on volunteer duty or representing the SMP
- Theft or other illegal acts
- Loss of a license (e.g., driver's license) required to carry out assignments
- Unauthorized use or misuse of SMP equipment or materials
- Harm, abuse, or mistreatment of beneficiaries, co-workers, or other persons
- Serious and repeated failure to follow SMP policies and procedures
- Inability to meet physical, cognitive, or emotional standards of performance
- Repeated failure to perform assigned duties satisfactorily
- Unresolvable conflict of interest
- Serious breach of boundaries

**Immediate Dismissal and Suspension** - Some behaviors are so unacceptable that, upon verification, they constitute grounds for immediate dismissal. If a question exists about the unacceptable behavior, the SMP will temporarily suspend the volunteer from service pending the results of an investigation. Grounds for immediate dismissal include:

- Fraud, theft, or abuse in connection with SMP volunteer service
- Serious illegal act
- Gross negligence causing bodily harm in connection with SMP volunteer service
- Breach of confidentiality
- Reporting for volunteer service under the influence of alcohol or illegal drugs
- Using violence in the workplace

**Exit Interview** - Some SMP programs conduct exit interviews with outgoing volunteers. If your program conducts exit interviews, please participate and answer the questions candidly. Your responses will help managers identify the SMP volunteer program's strengths and weaknesses, and to make improvements where needed. We encourage your participation.



## Volunteers with Disabilities

The SMP program values the service of volunteers with disabilities. Program managers strive to include volunteers with disabilities in all facets of the program to the extent that an individual's physical capacity allows, and to ensure access to all SMP program facilities. When requested, the program will make reasonable accommodations to meet the special needs of volunteers with disabilities.

**Please note that a certificate of ability may be requested by your immediate supervisor before you may begin your volunteer duties in order to ensure your safety and reduce the risk of SMP's liability.**



# **INDIANA SMP**

## **Volunteer Handbook**

### **– APPENDIX –**

### **Volunteer Role Descriptions**



## Volunteer Role Descriptions:

### ROLE: Assisting with Administrative

#### Purpose

Help accomplish the SMP mission by providing administrative support to SMP paid staff and volunteers.

*The SMP mission is to educate and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, error, and abuse through outreach, counseling, and education.*

#### Suggested Activities

Volunteers who provide administrative support handle tasks such as copying, general filing, and making outbound phone calls in support of SMP activities, for example, locating and reserving training space, confirming participant attendance, etc. Volunteers who provide administrative support may perform other tasks as mutually agreed, including:

- Word processing
- Data entry
- Scheduling presentations and other outreach activities
- Collating
- Internet searches
- Fulfilling requests for information and materials
- Handling mail and correspondence

#### Limitations

Volunteers who provide administrative support do not receive inbound phone calls or field questions from the public. Instead they defer requests for information and assistance to paid staff or volunteers who are qualified to answer SMP questions.

#### Measures

- Timely completion of assigned tasks
- Satisfaction of SMP staff regarding quality of work

### Qualifications

- Good oral and written communication skills
- Computer literacy, including familiarity with internet, email, and other programs as necessary
- Ability to operate office equipment
- Ability to work and get along well with others from diverse backgrounds

### Time Commitment

SMP volunteer schedules are flexible. The local coordinator of volunteers works with each volunteer who assists with administration to determine the number of hours the volunteer works each month, and to schedule the work accordingly. Because of the training SMP volunteers receive, they are asked to commit to a minimum of one year.

### Location

Volunteers who provide administrative support work at the offices of the local volunteer host organization (VHO) or other assigned locations.

### Supervision

Volunteers report to the local program coordinator or coordinator of volunteers and, when appropriate, to the statewide program coordinator.

### Benefits

Volunteers who provide administrative support receive additional training on office procedures and the safe use of equipment. All SMP volunteers have the satisfaction of participating in a national effort to educate Medicare beneficiaries, their caregivers, and the general public about how to Prevent, Detect, and Report Medicare fraud, errors, and abuse.

## **ROLE: Distributing Information**

### **Purpose**

Help accomplish the SMP mission by transporting and disseminating SMP information to sites and events throughout the community, and/or presenting prepared copy or scripted activities for outreach.

*The SMP mission is to educate and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, error, and abuse through outreach, counseling, and education.*

### **Suggested Activities**

SMP information distributors deliver and disseminate hard copy education and information materials through:

- Senior residential facilities, including senior apartment buildings and residential care facilities
- Senior centers and community centers
- Health care providers, including hospitals and clinics
- Agencies that serve Medicare and Medicaid beneficiaries and their caregivers
- Health fair and senior fair booths or kiosks
- Libraries

Read or present prepared information materials, or perform scripted activities, to inform and educate Medicare and Medicaid beneficiaries, their caregivers, and others at meetings and other events.

Identify other locations that will accept and display SMP education and information materials.

### **Limitations**

SMP volunteers whose role is to distribute information do not engage beneficiaries in individual discussions about personal information or situations. Instead they defer questions about specific cases to paid staff or volunteers who are qualified as counselors.

## **Measures**

This activity will be measured by the number of education and information materials (e.g., brochures and fact sheets) taken from the dissemination locations, and, when applicable, by the number of presentations or performances and the number of people in the audience.

## **Qualifications**

- Ability to transport and carry education and information materials to designated locations
- Valid driver's license
- Automobile (or other vehicle) insurance
- Good oral communication skills (only applicable if presenting or performing scripted information)
- Ability and willingness to distribute scripted information related the Indiana SMP program

## **Time Commitment**

SMP volunteer schedules are flexible. The local coordinator of volunteers works with each volunteer to determine the number of hours the volunteer works each month, and to schedule assignments accordingly. Because of the training SMP volunteers receive, they are asked to make a minimum commitment of one year.

## **Location**

Volunteers who distribute information work in their vehicles and at sites throughout the local community.

## **Supervision**

Volunteers report to the local program coordinator or coordinator of volunteers and, when appropriate, to the statewide program coordinator.

## **Benefits**

All SMP volunteers have the satisfaction of participating in a national effort to educate Medicare beneficiaries, their caregivers, and the general public about how to Prevent, Detect, and Report Medicare fraud, errors, and abuse.

## **ROLE: Staffing Exhibits**

### **Purpose**

Help accomplish the SMP mission by providing outreach through staffing of information kiosks or exhibits at events.

*The SMP mission is to educate and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, error, and abuse through outreach, counseling, and education.*

### **Suggested Activities**

SMP exhibitors provide general information about the SMP program and Medicare fraud, errors, and abuse at events by:

- Transporting kiosk materials and supplies to events
- Distributing written information about the SMP program and its services
- Distributing written information about the Indiana SMP program
- Answering general questions about the SMP program and its services
- Responding to basic SMP questions

### **Limitations**

Volunteers who staff exhibits are limited to providing general information about the SMP program and Medicare fraud, errors, and abuse. They do not engage in discussions of personal information or specific situations. They defer requests for counseling to paid staff or volunteers who are qualified as counselors.

### **Measures**

This activity will be measured by the number of exhibits the volunteer staffs, the number of people who visit the exhibit, and the number of education and information materials (e.g., brochures and fact sheets) taken by those attending the event.

### **Qualifications**

- Good oral communication skills
- Ability to transport and carry education and information materials to outreach events
- Valid driver's license
- Automobile (or other vehicle) insurance
- Ability and willingness to distribute scripted information related the Indiana SMP program

## **Time Commitment**

SMP volunteer schedules are flexible. The local coordinator of volunteers works with each exhibitor to determine the number of hours the volunteer works each month, and to schedule assignments accordingly. Because of the training SMP exhibitors receive, they are asked to make a minimum commitment of one year.

## **Location**

Volunteers who staff exhibits work at sites throughout the local community.

## **Supervision**

Volunteers report to the local program coordinator or coordinator of volunteers and, when appropriate, to the statewide program coordinator.

## **Benefits**

SMP exhibitors receive training on the basics of Medicare benefits, Medicare fraud, errors, abuse, and current scams. All SMP volunteers have the satisfaction of participating in a national effort to educate Medicare beneficiaries, their caregivers, and the general public about how to Prevent, Detect, and Report Medicare fraud, errors, and abuse.



## **ROLE: Making Group Presentations**

### **Purpose**

Help accomplish the SMP mission by providing substantive presentations to groups in the community.

*The SMP mission is to educate and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, error, and abuse through outreach, counseling, and education.*

### **Suggested Activities**

SMP presenters make 5 to 30 minute presentations using SMP-approved materials and scripts to audiences that consist of Medicare beneficiaries, their caregivers, and/or other members of the public who want to gain awareness of the SMP program and the national effort to educate communities about how to Prevent, Detect, and Report Medicare fraud, errors, and abuse in the health care system. SMP presentations also include an opportunity for Q & A with the audience about covered topics and information. These presentations may take place at:

- Senior centers and community centers
- Health fairs and senior fairs
- Medicare education events
- Meetings of civic or faith-based organizations
- Meetings of health care providers
- Meetings of local law enforcement officials
- Libraries
- Universities and colleges

SMP presenters may also identify other audiences and locations where in depth presentations may be appropriate.

### **Limitations**

Volunteers who make presentations are limited to providing general information about the SMP program and related topics. They do not engage beneficiaries in individual discussions about personal information or situations other than to answer basic questions. They defer requests for counseling to paid staff or volunteers who are qualified as counselors.

### **Measures**

This activity is measured by the number of presentations the volunteer gives, the attendance numbers, and an evaluation of the presenter's effectiveness in conveying information about SMP topics and program goals.

## **Qualifications**

- Good oral communication and public speaking skills
- Ability and willingness to distribute scripted information related the Indiana SMP program
- Ability to work and get along well with others from diverse backgrounds
- Ability to operate audiovisual equipment (e.g., Power Point program, laptop, and projector)
- Ability to travel to presentation sites throughout the community
- Valid driver's license
- Automobile (or other vehicle) insurance

## **Time Commitment**

SMP volunteer schedules are flexible. The local coordinator of volunteers works with each volunteer to determine the number of hours the volunteer works each month, and to schedule assignments accordingly. Because of the training SMP presenters receive, they are asked to commit to a minimum of one year.

## **Location**

Volunteers who make group presentations work at locations throughout the community.

## **Supervision**

Volunteers report to the local program coordinator or coordinator of volunteers and, when appropriate, to the statewide program coordinator.

## **Benefits**

SMP presenters receive training on the basics of the SMP program, Medicare benefits, Medicare fraud, errors, and abuse, and current scams. They may also receive training on making group presentations and presentation skills. All SMP volunteers have the satisfaction of participating in a national effort to educate Medicare beneficiaries, their caregivers, and the general public about how to Prevent, Detect, and Report Medicare fraud, errors, and abuse.

## **ROLE: Counseling**

### **Purpose**

Help accomplish the SMP mission by providing individual counseling.

*The SMP mission is to educate and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, error, and abuse through outreach, counseling, and education.*

### **Suggested Activities**

SMP counselors discuss individual situations with beneficiaries and/or their caregivers and may review Medicare Summary Notices (MSN), billing statements, medical records, and other related financial and health documents. Counselors also educate beneficiaries about Medicare basics and Medicare fraud, error, and abuse, as well as current health care scams. Counselors listen carefully to the beneficiary's or caregiver's account of a situation and determine whether to:

- Share information with, or provide an explanation to, the beneficiary or caregiver
- Refer the beneficiary or caregiver to a staff person or volunteer who handles complex interactions, or
- Send the beneficiary to another more applicable organization for assistance (such as the SMP state office or 1-800-Medicare, etc.)

When a counselor deems it necessary to refer a beneficiary's case to a staff person or volunteer who handles complex interactions, the counselor may receive and confidentially transmit the beneficiary's documents to that person with the individual's confidentiality and data security procedures in mind. Counselors provide their services in person or by telephone. Counseling may take place at locations such as senior centers, SMP or Medicare education events, libraries, etc.

### **Limitations**

Counselors may receive and hold confidential beneficiary documents such as MSNs and medical records only when sending a case to a complex interactions specialist, unless the counselor is also designated as a complex interactions specialist.

### **Measures**

This activity is measured by the number of counseling sessions the volunteer provides and by an evaluation resource, such as a client feedback form.

## **Qualifications**

- Good oral communication skills
- Active listening skills
- Ability and willingness to distribute scripted information related the Indiana SMP program
- Ability to explain Medicare coverage and program integrity rules and procedures in terms that beneficiaries can understand
- Ability to work and get along well with others from diverse backgrounds
- Ability to request assistance as needed, when the answer to a question is not known by the volunteer

## **Time Commitment**

SMP volunteer schedules are flexible. The local coordinator of volunteers works with each volunteer to determine the number of hours the volunteer works each month, and to schedule assignments accordingly. Because of the training SMP counselors receive, they are asked to commit to a minimum of one year.

## **Location**

Volunteers work at the offices of the local volunteer host organization (VHO) and at sites in the community where activities such as SMP presentations and information dissemination take place.

## **Supervision**

Volunteers report to the local program coordinator or coordinator of volunteers and, when appropriate, to the statewide program coordinator.

## **Benefits**

SMP counselors receive training on the basics of Medicare benefits, Medicare fraud, errors, abuse, and current scams. They may also receive training on counseling skills, available local service providers (such as SMP, AAAs, etc.) and triage procedures. All SMP volunteers have the satisfaction of participating in a national effort to educate Medicare beneficiaries, their caregivers, and the general public about how to Prevent, Detect, and Report Medicare fraud, errors, and abuse.

## **ROLE: Handling Complex Interactions**

### **Purpose**

Volunteers who handle complex interactions assist Medicare beneficiaries in reporting specific instances of suspected health care fraud, errors, and abuse. They help beneficiaries distinguish error from potential fraud or abuse and, as a result of their research, may act on a beneficiary's behalf to correct an error or refer suspected fraud and abuse to appropriate authorities. Because SMPs work closely together in a unique relationship with Medicare and Medicare fraud and abuse investigators, they have the ability to provide individual assistance and expedited referrals when beneficiaries report suspected fraud, errors, and abuse.

*The SMP mission is to educate and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, error, and abuse through outreach, counseling, and education.*

### **Suggested Activities**

Volunteers who handle complex interactions respond to beneficiary and caregiver concerns and inquiries that involve complaints of health care fraud, errors, and abuse by:

- Interviewing the beneficiary and/or caregiver in person or by telephone
- Obtaining detailed information related to the report of fraud, errors, or abuse
- Gathering information and documentation about the case, such as Medicare Summary Notices (MSN), Explanation of Benefit (EOB) records, billing statements, other financial records that contain confidential personal identifying information, or legal documentation related to the complaint
- Reviewing and evaluating information and documentation about the case
- Researching issues using SMP manuals and other Medicare program integrity resources
- Entering the report of suspected fraud, errors, or abuse into the SMP data reporting system
- Assessing the case for further investigation and/or referral
- Referring the case to the appropriate government entity for investigation
- Supporting beneficiaries as their reported issue moves through the investigation and resolution process

### **Measures**

This activity is measured by:

- The number of complex interactions the volunteer handles
- The total amount of any health care charges that are avoided, saved, or expected to be recovered to Medicare, Medicaid, beneficiaries, or others due to the volunteer's work
- An evaluation tool, such as a client feedback form

## **Qualifications**

- Good oral communication skills
- Active listening skills
- Research and case management skills
- Ability and willingness to learn and share information related to preventing, detecting, and reporting health care billing fraud, errors, and abuse
- Ability to follow case referral procedures
- Ability to work independently
- Ability to work and get along well with others from diverse backgrounds
- Computer literacy, including ability to use the Internet and on line reporting programs
- Patience and persistence

## **Time Commitment**

Volunteer schedules are flexible. The local coordinator of volunteers works with each volunteer to determine the number of hours the volunteer works each month, and to schedule assignments accordingly. Because of the training SMP volunteers receive, they are asked to commit to a minimum of one year.

## **Location**

Volunteers who handle complex interactions work at the offices of the local volunteer host organization (VHO) or at other approved locations.

## **Supervision**

Volunteers report to the local program coordinator or coordinator of volunteers and, when appropriate, to the statewide program coordinator.

## **Benefits**

SMP volunteers receive training on the basics of Medicare fraud, errors, abuse and current scams. SMP complex interactions specialists receive additional training on case development and management skills, and procedures for referring complaints for further investigation. All SMP volunteers have the satisfaction of participating in a national effort to educate Medicare beneficiaries, their caregivers, and the general public about how to Prevent, Detect, and Report Medicare fraud, errors, and abuse.



## SMP/SHIP Volunteer Rights and Responsibilities

### AS AN SMP VOLUNTEER...

#### YOU have a **RIGHT** to:

- Meaningful work assignments
- A role description
- Recognition for your contributions
- Treatment as an equal among your co-workers
- A safe work environment
- A respectful work environment
- Freedom from discrimination
- Freedom from harassment
- Orientation and training
- Effective supervision
- Constructive, regular feedback about your work
- A copy of your background check report, upon request
- File grievances and appeal resulting decisions
- Receive all the pertinent information you need to perform your work assignments
- Know the standards of performance that apply to the work you do
- Refuse any tasks or work assignments, especially when the assignment requires you to do something for which you have not been trained
- Receive clear information about what TO do as well as what NOT to do, so that you know the boundaries for your role
- Secure and confidential records in your personnel file
- Full access to your personnel file
- Resign from your volunteer service at any time
- Provide the program with feedback about your experience as a volunteer at any time, including, but not limited to, your retirement from service with the program

#### YOU have a **RESPONSIBILITY** to:

- Provide services responsibly and objectively, regardless of the background or characteristics of the beneficiaries you serve
- Represent the program only to the extent that your role specifically authorizes
- Work within the parameters and boundaries set by the program
- Not present yourself as a spokesperson for the program unless specifically authorized by your supervisor to do so
- Not promote religious or political beliefs or personal business dealings during your volunteer work hours
- Not promote specific services, providers, or products while conducting program work
- Inform your supervisor of any conflicts of interest that may arise after placement in your volunteer position
- Report any abuse that you may witness involving the program's beneficiaries or clients
- Report accidents, injuries, and errors that you become involved in or witness while conducting program work
- Be on time or give advance notice if you must be absent
- Protect the confidentiality of the program's beneficiaries and/or clients
- Follow procedures to ensure the security of clients' electronic and hard copy data
- Tell your supervisor about changes in your health or medical treatment that might adversely affect your work
- Complete required training programs, including continuing education programs
- Notify your supervisor if your contact information has change

