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Administration for Community Living Office of Healthcare Information and Counseling

Managing Through COVID-19 Work grouP - September 2020

Modifying Volunteer Workflow, Support, and Responsibilities

Preparing for Remote Medicare Open Enrollment Toolkit

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# Introduction

COVID-19 has impacted all ACL grantees in many ways, and that impact is expected to continue throughout the Medicare Open Enrollment Period in 2020. Providing excellent counseling services to beneficiaries, family members, and caregivers is the primary goal of ACL grantees. In prior years, this service was accomplished through a combination of face-to-face meetings at enrollment events and/or enrollment centers and phone counseling. For many programs across the country, face-to-face counseling has been eliminated out of concern for the safety and well-being of beneficiaries, volunteers, and program staff.

Programs are now focusing on:

* Ways to address the needs of beneficiaries
* Identifying impacts to delivery processes
* Supporting volunteers in a time of technological opportunities which may be outside their comfort levels
* Strengthening processes that will further safeguard beneficiary information
* Training volunteers on revisions to workflow, processes, and policies
* Finding new ways to support the volunteers who are performing such import work throughout the service areas during very difficult times.

The following information demonstrates how some programs are preparing for the 2020 Open Enrollment Period (OEP) during the COVID-19 pandemic.

# Questions to Ask When Preparing for the Open Enrollment Period (OEP) During COVID-19

1. Where will workflow be interrupted by COVID-19 during OEP in 2020?
2. What volunteer responsibilities will require revision with COVID-19 OEP when face-to-face counseling is not offered?
3. In what ways will program staff support need to be altered to assist volunteers and beneficiaries?
4. Will additional call center representatives be needed? (such as temporary paid positions)?
5. Will additional volunteer counselors be needed?
6. What program policies and procedures will need revision?
7. Will volunteer documents, forms and guidelines require modification?
8. What space, equipment (including shredders), and internet service will volunteers have available in their home office setting?
9. How do we assess volunteer technology skill level and address needs?
10. How do we help volunteers assess beneficiary technology skill level, technology availability, and adapt our approaches?
11. What communication platforms do we have available to use and how do we assess what will work for our volunteers and beneficiaries?

# Basic Workflow: Face-To-Face Vs. “Virtual” Review

|  |  |
| --- | --- |
| STEP—OEP 2019 | MODIFICATION—OEP 2020 |
| 1. Call Center receives beneficiary call, collects beneficiary information, schedules beneficiary for face to face counseling at community enrollment center or enrollment event near their home. | Call Center receives beneficiary call, collects information for referral, identifies available in-kind, community, or state-wide counselor, and transmits referral to counselor.  (NOTE: Review call center script for items beneficiary should be prepared to discuss with counselor, example - My Medicare account, medication list, etc.) |

|  |  |
| --- | --- |
| STEP—OEP 2019 | MODIFICATION—OEP 2020 |
| 1. Call Center sends appointment confirmation document to beneficiary for additional information needed for appointment. | Call Center sends Part D Preparation for Counseling form to beneficiary for completion. |
| 1. Beneficiary appears at enrollment center or event at designated appointment time. | Counselor phones beneficiary, confirms scope of counseling session, asks about virtual session, and determines next steps. (ex: drug plan comparison completed and sent to beneficiary through what method? Second session set up to review with beneficiary and enroll via what method?) |
| 1. N/A | Counselor will add beneficiary to personal appointment schedule for subsequent sessions. |
| 1. Counseling session is completed with beneficiary receiving copies of all documentation. | Counseling session is completed with beneficiary receiving final copies of enrollment confirmation through agreed upon method. |
| 1. Beneficiary OEP Exit Survey completed. | Beneficiary OEP Exit Survey provided to beneficiary via agreed upon method. |
| 1. Sign-in sheet updated to reflect completion | N/A |
| 1. Counseling contact entered in data system. | Counseling contact entered in data system. |
| 1. All notes shredded. | All notes shredded. |

# Potential Volunteer Responsibility Impacts

1. Volunteer is operating all office functions. They are unable to rely on partner site or community event site for use of laptops, printers, copiers, mail service, and possible IT support with equipment.
2. Volunteer technology skills may need to be expanded.
3. Volunteers may encounter frustrated or angry beneficiaries when face-to-face counseling is not available. They may need training to enhance skills in active listening and tips to de-escalate situations.
4. Volunteers may find that more than one session will be needed to complete an application. They will need to keep their own appointment schedule for subsequent sessions with beneficiaries.

# Potential Program Staff Responsibility Impacts

1. In preparation for OEP 2020, program staff will review and update all forms/documents, instructions/guides, and policies/procedures potentially impacted by OEP amidst COVID-19.
2. Program staff will assist with identifying workflow impacts to volunteers during OEP amidst COVID-19.
3. Program staff will establish volunteer training to address workflow modifications, forms/documents, instructions/guides, and policies/procedures impacted by OEP amidst COVID-19.
4. Program staff will establish frequent check-ins with volunteers.
5. Program staff will remain available for phone assistance with volunteer and or beneficiary.
6. Program staff will provide escalated support of beneficiary and volunteer when necessary.
7. Program staff will remain available to assist volunteer with trouble shooting IT issues and involve more technical staff as needed.
8. Program staff will check status of volunteer office supplies and escalate support when necessary.
9. Program staff will authorize expenditures for postage, paper, and ink and will process reimbursement requests promptly.
10. Program staff will assist with program reporting data entry if the volunteer is struggling to meet submission deadlines.
11. Program staff will coordinate distribution and return of client satisfaction surveys or exit surveys.

# Covid-19 OEP Impact on Documents, Guidelines, Policies and Procedures

|  |  |  |
| --- | --- | --- |
| FORMS/DOCUMENTS | INSTRUCTIONS & GUIDELINES | POLICY & PROCEDURE |
| Part D Worksheet | Call Center Script | Program Statement: OEP During COVID-19 |
| Volunteer Expense Forms | Volunteer Home Office Guidelines | Program Statement: Use of Disclaimer Statements |
| Tracking Multiple Appointments and STARS Entry | Virtual Platforms: Guidelines for Use | Program Statement: Use of Virtual Platforms during OEP Counseling |
| OEP Exit Survey | Volunteer Guide to Trouble Shooting IT Issues | Program Statement: Support of Home - Based Volunteers |
| Call List | Phone Counseling Tips and Techniques | Program Statement: Volunteer Expenses during OEP |
|  | Response to Media Inquiries in Volunteer Community | Program Statement:  Staff Support of Remote Volunteers |
|  | Guidelines to Encryption and Other Types of Security and Confidentiality Needs | Program Statement:  Media |
|  |  | Program Statement: Ordering Supplies and Reimbursement Process |
|  |  | Program Statement: Confidentiality and Security of Beneficiary Information |

# Preparing Volunteers for Covid-19 OEP

Training Topics:

1. Working from home guidelines (confidentiality and security of information)
2. Workflow revision discussion
3. Presentation and discussion of policies, procedures, and guidelines
4. Presentation and discussion of documents, forms, instructions, and guidelines
5. Counseling techniques for a virtual environment, including handling difficult situations with beneficiaries
6. Dialog with volunteer questions and concerns of an OPE without the ease of face to face environment for beneficiaries and volunteers
7. Presentation and discussion of counseling options-phone, email, text, snail mail, virtual
8. OEP Exit Survey process

# Sample Job Descriptions Resulting From Covid-19 Impact Review

COMPUTER ASSISTANT JOB DESCRIPTION

DUTIES:

* Enter client drugs into Plan Finder on www.Medicare.gov, including calling the client or pharmacy to verify accuracy of the drug list.
* Complete online enrollment form for Part D or Medicare Advantage plans after the client has been counseled and has requested enrollment.
* Complete the “Computer Assistant Report Form” for each client.

RESPONSIBILITIES:

* Is an adult who has been screened as an individual who does not have a conflict of interest and can maintain the confidentiality of client information collected for this task.
* Must have computer skills, including using the internet.
* Must complete a training on the use of the Medicare Plan Finder tool.
* Will set up a schedule with the local site coordinator and volunteers.
* Will keep all client information confidential.
* Will not be active in selling insurance, drug plans or have any potential financial gain from being a computer assistant.
* Will sign the volunteer agreement.

RESTRICTIONS:

* Will not counsel clients. Will only enter drugs in the Plan Finder.
* Are not certified counselors, will not counsel clients, and will not attend counselor update training.

volunteer scheduler job description

DUTIES:

* Schedule client appointments
* Optional: Enter counselor availability in calendar

VOLUNTEER SCHEDULER AGREEMENT:

* I will protect the **confidentiality** of all client information. All client information is **CONFIDENTIAL**. Any information collected or created on behalf of a client is **not discussed with anyone,** except the certified counselor who will be counseling the client.
* I will provide services in a professional and **unbiased** manner without regard for my personal advantage.
* I will limit my program activities to those for which I have received training, namely scheduling appointments for Medicare counseling.
* I will not counsel clients nor will I offer subject matter information to them.
* I will only use materials provided or approved by my program.
* I will provide appropriate and timely reporting of scheduler activity if sponsor requests such.
* I will keep all client information safely and confidentiality stored according to program protocols.

OFFICE ASSISTANT VOLUNTEER JOB DESCRIPTION

RESPONSIBILITIES:

An office assistant volunteer may provide one or more of the following services:

* Take calls from individuals seeking Medicare counseling.
* Schedule appointments for clients with certified Medicare counselors.
* Make counseling appointment reminder calls to clients.
* Assist with copying, mailing or other office assistance for sponsor coordinator and volunteers.

VOLUNTEER CANDIDATE REQUIREMENTS:

* Must be 21 years of age or older.
* Must complete volunteer office assistant training.
* Not be active in selling insurance or have any potential financial gain from being a volunteer.
* Sign the volunteer agreement.
* Fill out the volunteer application.
* Computer skills preferred.
* Always keep client information confidential.