



## **CLAIM's December 2020 Training for Volunteers**

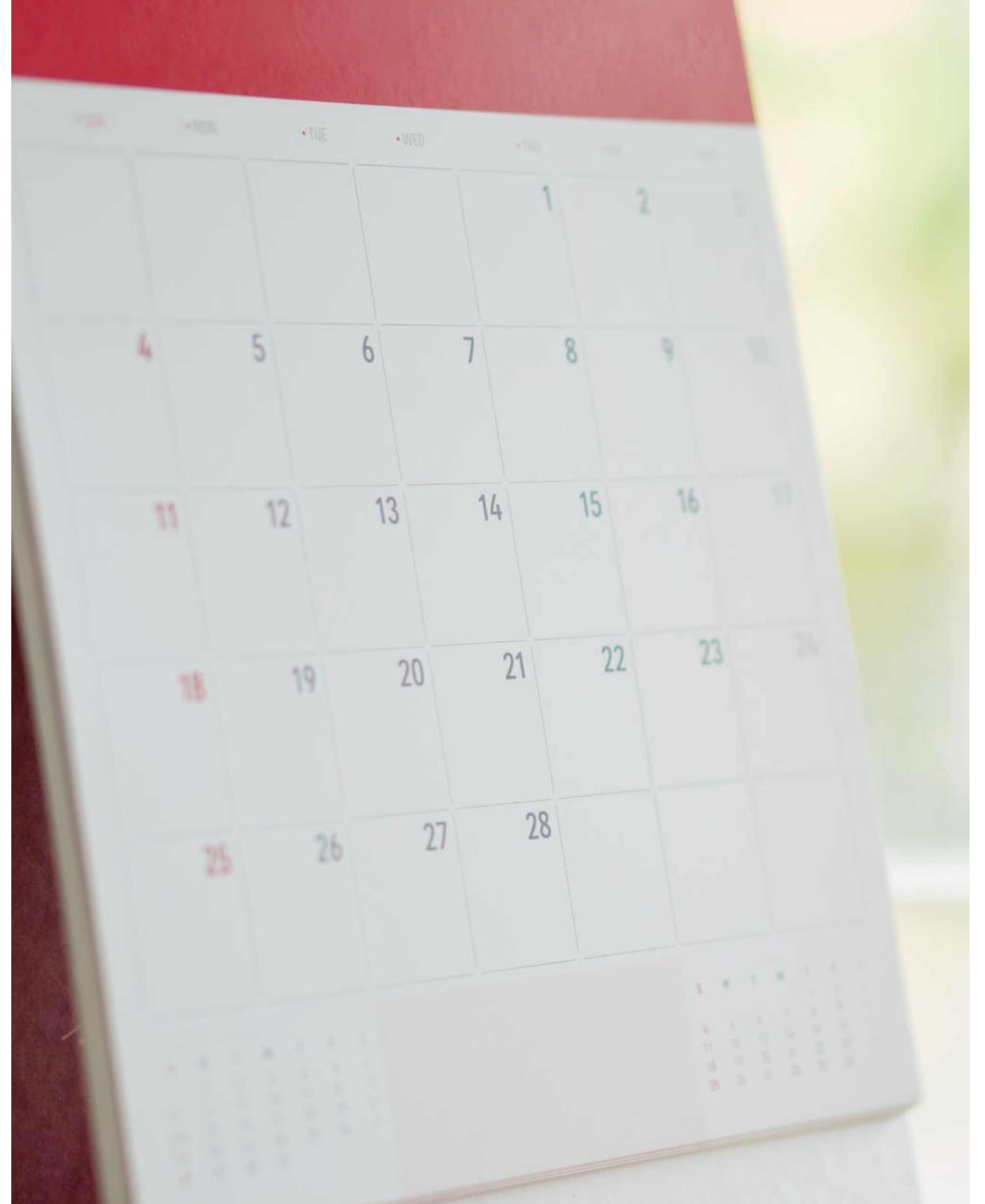
**12.2020**

**P**



# Today's Agenda

- A little house cleaning for the new year!
  - AEP referrals closed?
  - STARS entries complete?
  - Do you have a Unique ID?
  - Are you getting CLAIM WATCH?
- Home Tab Reminders
- How to enter Client Contacts
- How to enter Outreach Events
- Review your own CLAIM deliverables
- Q & A



### Current News

No news items to display

[Show news archive ...](#)

### Upcoming Events

December 2020						
<<						>>
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

[12/9: SHIPtools Training for 2021 Option 1](#)  
(training event)

[12/11: SHIPtools Training for 2021 Option 2](#)  
(training event)

[View all activities for December](#)

# SHIPtools Contacts Update:

- **As of January 4, 2021 - No More STARS!**
- Use SHIPtools to enter Client Contact in 4 ways:
  - Use the CCF button on main Referral Tab
  - Use new CCF button on Referral Tab Edit Referral Detail
  - Use ADD NEW CONTACT button on Clients Tab
  - Use ADD CLIENT CONTACT on Clients Tab Edit Client Detail
- SHIPtools will be uploaded to STARS periodically

# Referrals Tab

CLAIM State Health Insurance Assistance Program

DCI Missouri Department of Commerce & Insurance

Freeman Health System  
STATE HEALTH INSURANCE ASSISTANCE PROGRAM

Russ Alcorn [logout](#)

[HOME](#) **REFERRALS** [CLIENTS](#) [EVENTS](#) [ACTIVITIES](#) [TRAININGS](#)

Option #1:  
Use the CCF button on main Referrals Page.

When this is used, the referral will be changed to closed.

[Search Filters](#) (click to hide/show)

Add Filter

Referral Date From:  To:

[Change Columns](#) (click to hide/show)

**FIND**

<a href="#">Referral Date</a>	<a href="#">Client Name</a>	<a href="#">Handled By</a>	<a href="#">Assigned Partner</a>	<a href="#">Assigned Volunteer</a>	<a href="#">Call Time</a>	<a href="#">Referral Status</a>	
9/10/2020	<a href="#">Dudley Wright</a>	Cindy Carr	Freeman Health System	Jamie Gillmore		Open	<a href="#">Add CCF</a>
9/10/2020	<a href="#">Jennifer Brown</a>	Cindy Carr	Freeman Health System	Russ Alcorn		Open	<a href="#">Add CCF</a>
9/10/2020	<a href="#">Jim Black</a>	Cindy Carr	Freeman Health System	Russ Alcorn		Open	<a href="#">Add CCF</a>
9/10/2020	<a href="#">susie jones</a>	Russ Alcorn	Freeman Health System	Russ Alcorn		Open	<a href="#">Add CCF</a>

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Export options: [CSV](#) | [Excel](#)

## Referral Tab Detail (Edit Referral):

Option #2:  
Use new button on bottom of Referrals Detail page (will be available end of December 2020).

When this is used, the referral will be changed to closed.

Age Range	<input type="radio"/> under 65 years <input type="radio"/> 65-74 <input type="radio"/> 75-84 <input checked="" type="radio"/> 85 or older <input type="radio"/> Not Collected	Gender	<input checked="" type="radio"/> Female <input type="radio"/> Male <input type="radio"/> Other <input type="radio"/> Not Collected
How did client learn about CLAIM	<input type="text" value="CLAIM mailings/brochures/posters"/>	Type of client	<input checked="" type="radio"/> Beneficiary (self) <input type="radio"/> Caregiver (family member,conservator) <input type="radio"/> Couple <input type="radio"/> Agency

### Referral

Referral Status	<input checked="" type="radio"/> Open <input type="radio"/> Materials Request Only <input type="radio"/> Client Contacted <input type="radio"/> Closed <input type="radio"/> Canceled	Resolution	<input type="radio"/> Client did not return emails or phone calls <input type="radio"/> Answered general questions <input type="radio"/> Appointment scheduled <input type="radio"/> Counseled client (created CCF) <input type="radio"/> Distributed materials <input type="radio"/> Referred to an External Agency <input type="radio"/> Other <input type="radio"/> None
Notes	<input type="text" value="Can she save money on drugs?"/>		

Save

Add CCF



**Clients  
Tab:**

Option #3:  
Use ADD  
NEW  
CLIENT  
button  
when  
creating a  
Client  
Contact  
that is not a  
referral  
from  
CLAIM Call  
Center.

The screenshot shows the MCH/CLAIM website interface. At the top, there are logos for CLAIM (State Health Insurance Assistance Program) and DCI (Missouri Department of Commerce & Insurance), along with the text 'MCH/CLAIM STATE HEALTH INSURANCE ASSISTANCE PROGRAM'. A navigation menu includes links for HOME, REFERRALS, CLIENTS (highlighted with a red arrow), EVENTS, ACTIVITIES, TRAININGS, REPORTS, TEAM, and MANAGEMENT. In the top right corner, there are links for 'Cindy Carr' and 'Logout'. Below the navigation menu, the page title 'Clients' is displayed on the left, and a 'Show Client Notes' button is on the right. The main content area features a search filter section with a 'Search Filters (click to hide/show)' link, an 'Add Filter' dropdown, a 'Counselor' dropdown menu set to 'Carr, Cindy', and a checked checkbox for 'Show incomplete CCFs'. Below the search filters are links for 'Change Columns (click to hide/show)' and 'Saved Searches (click to hide/show)', and a blue 'FIND' button. At the bottom left, a blue 'ADD NEW CLIENT' button is highlighted with a red arrow. The bottom of the page shows a table header with columns: 'Client Name', 'Contact Date', 'Counselor', 'Approved', and 'Export Status'.

# Clients Tab:

Option #4:  
Add a new  
contact to  
an existing  
client by  
clicking on  
their name  
to go to  
Client  
Detail.....

**CLAIM** State Health Insurance Assistance Program  
**DCI** Missouri Department of Commerce & Insurance  
**MCH/CLAIM**  
STATE HEALTH INSURANCE ASSISTANCE PROGRAM

HOME REFERRALS **CLIENTS** EVENTS ACTIVITIES TRAININGS REPORTS TEAM MANAGEMENT

## Clients

[Search Filters \(click to hide/show\)](#)

Add Filter

Counselor:

Show incomplete CCFs:

[Change Columns \(click to hide/show\)](#)

[Saved Searches \(click to hide/show\)](#)

<u>Client Name</u>	<u>Contact Date</u>	<u>Counselor</u>	<u>Approved</u>	<u>Export Status</u>
<a href="#">Stotts, Donald</a>	Dec 8, 2020	Carr, Cindy	Approved	
<a href="#">Stotts, Donald</a>	Nov 24, 2020	Carr, Cindy	Approved	



# Clients Tab:



Option #4  
continued:

Near the  
bottom of  
the page,  
you can  
use **ADD  
CLIENT  
CONTACT**  
button.

CLAIM DCI MCH/CLAIM STATE HEALTH INSURANCE ASSISTANCE PROGRAM

HOME REFERRALS **CLIENTS** EVENTS ACTIVITIES TRAININGS REPORTS TEAM MANAGEMENT

## Clients

### Donald Stotts

Name:	Donald Stotts	Rep Name:	son Stotts
Address:	1916 Colt St Trenton, MO 64683	Rep Address:	
County:	Grundy		
Home Phone:		Rep Work Phone:	
Mobile Phone:	(660) 635-0203	Rep Mobile Phone:	
Other Phone:		Rep Other Phone:	(816) 309-3390
Email Address:		Rep Email Address:	

MyMedicare User Account

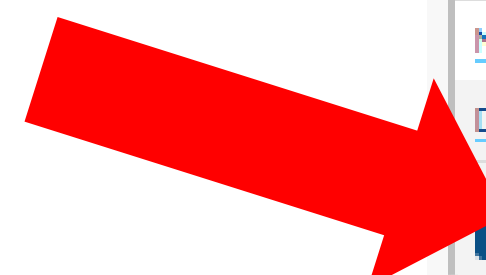
Username

Password  [show](#)

**Update Client Contact Info**

### Referrals

Referral Date	Assigned Partner	Assigned Volunteer	Referral Status	CCF Date
11/2/2020	MCH/CLAIM	Cindy Carr	Closed	11/24/2020



### Referrals

Referral Date	Assigned Partner	Assigned Volunteer	Referral Status	CCF Date
11/2/2020	MCH/CLAIM	Cindy Carr	Closed	11/24/2020

### Client Notes

Created By	Updated By	Status	Note	File
No client notes				

**Add Client Note**

### Supporting Documentation

CCF Contact Date	Current Plan Comparison	New Plan Comparison	Enrollment Confirmation
No supporting documents found			

### Client Contacts

Date	Type	Counselor's Name	Duration	Exported
<a href="#">November 24, 2020</a>	Telephone	Cindy Carr	2 hours, 0 minutes	
<a href="#">December 8, 2020</a>	Telephone	Cindy Carr	30 minutes	

**Add Client Contact** **Add Couples Contact**

### Demographics

Collected on December 8, 2020

**Update Demographics**

# Other Tips for SHIPtools Contacts:

- If you choose ADD COUPLES CONTACT button, it will create 2 contacts.
- If you use Co-Counselor box, both counselors will NOT get credit. Only main counselor will get the contact credit.
- You must fill in all areas with red/pink highlights, they are required fields. If all fields are completed, the contact will show as Approved on Contact Tab. If not correct, it will show as Incomplete and need to be adjusted before it will upload.
- You can only choose to mark Medicare Part D or Medicare Advantage Topic. SHIPtools will gray out the other choice, so you cannot use it.
- MIPPA box will not show on the form! MIPPA will automatically be marked “Yes” if you choose one of the items that makes it a MIPPA contact. (Unless you are CLAIM Staff or BEC)
- There is now a place to put MyMedicare User Account information for UN/PW for each client!

**And please remember to put some information of what you discussed in Notes section!!**

# SHIPtools Outreach or Media Events Update:

- **As of January 4, 2021 - No More STARS!**
- Use SHIPtools to enter Outreach or Media Events:  
Use **ADD NEW EVENT** button on main Events Tab.
- You can enter Outreach or Media Events yourself or send the information to your Regional Liaison to enter on your behalf.
- You can submit an item for your teams Home Tab Calendars for everyone in your organization.
- SHIPtools will be uploaded to STARS periodically

# EventsTab:

The screenshot shows the top navigation bar of the MCH/CLAIM website. On the left, there are logos for CLAIM (State Health Insurance Assistance Program) and DCI (Mississippi Department of Commerce & Insurance). On the right, the text reads "MCH/CLAIM STATE HEALTH INSURANCE ASSISTANCE PROGRAM". In the top right corner, there is a user profile for "Cindy Carr" with a "logout" link. Below the header is a navigation menu with the following items: HOME, REFERRALS, CLIENTS, EVENTS, ACTIVITIES, TRAININGS, REPORTS, TEAM, and MANAGEMENT. A red arrow points to the "EVENTS" menu item.

Used to enter new Outreach or Media Events you are reporting.

The screenshot shows the "Events" page interface. At the top, the word "Events" is displayed in a large font. Below this is a search and filter section. It includes a "Search Filters (click to hide/show)" link, an "Add Filter" dropdown menu, and a "Presenter:" dropdown menu with "Carr, Cindy" selected. There are also links for "Change Columns (click to hide/show)" and "Saved Searches (click to hide/show)". A blue "FIND" button is located at the bottom left of the search section. Below the search section is a dark blue button labeled "ADD NEW EVENT", with a red arrow pointing to it. At the bottom, a table header is visible with columns for "Date", "Event Name", and "Follow-up".

# EventsTab:

Use same form for Outreach Event or Media Event. You can have several counselors within your organization as presenters or exhibitors.

### Events

#### Add an Event

Data Submitter: Cindy Carr

Organization: MCH/CLAIM

Event Name:

Description: 

**B** *I* U ~~S~~

Powered by TinyMCE

Event Type: -- Select One --

#### Session Details

Date:  to

Contact First Name:

Contact Last Name:

Phone:

Additional Phone:

Email:

#### Session Location

Use my organization's address:

Session Location:

City, State, Zip:  |  |

County: -- Select One --



#### Session Presenter(s)/Contributor(s)

Presenter/Contributor: Carr, Cindy  hours  minutes

Add'l Presenter/Contributor: --- Select One ---  hours  minutes

Add'l Presenter/Contributor: --- Select One ---  hours  minutes

Add'l Presenter/Contributor: --- Select One ---  hours  minutes

Add'l Presenter/Contributor: --- Select One ---  hours  minutes

[Show more](#)

#### Audience

Beneficiaries  Partner Organizations

Employer-Related Groups  People with Disabilities

Family Members/Caregivers  Rural Beneficiaries

Limited-English Proficiency  Other

Medicare Pre-Enrollees

#### Target Beneficiary Group (check all that apply)

American Indian or Alaska Native  Rural

Asian  Other

Black or African American  Arabic

Disabled  Asian Indian

Employer-Related Groups  Chinese

Hispanic/Latino  Filipino

Languages Other Than English  Japanese

Low Income  Korean

N/A  Vietnamese

Native Hawaiian or other Pacific Islander

#### Topics Discussed (check all that apply)

Duals Demonstration  Medigap or Supplemental Insurance

Extra Help/LIS  Original Medicare (Parts A and B)

General SHIP Program Information  Other Prescription Drug Coverage

Long Term Care Insurance  Partnership Recruitment

Medicaid  Preventive Services

Medicare Advantage  Volunteer Recruitment

Medicare Fraud and Abuse  Other

Medicare Part D

#### MIPPA and Duals Demonstration

MIPPA Type

Yes

No

Duals Demonstration

Yes

No

# EventsTab:

New Events can be entered in advance and will not upload until all information is complete. This will help us track upcoming events for monthly reporting to DCI.

**CLAIM** State Health Insurance Assistance Program

**DCI** Missouri Department of Commerce & Insurance

**MCH/CLAIM** STATE HEALTH INSURANCE ASSISTANCE PROGRAM

Cindy Carr [logout](#)

HOME REFERRALS CLIENTS **EVENTS** ACTIVITIES TRAININGS REPORTS TEAM MANAGEMENT

## Events

[Search Filters](#) (click to hide/show)

Add Filter

Presenter:

[Change Columns](#) (click to hide/show)

[Saved Searches](#) (click to hide/show)

**FIND**

**ADD NEW EVENT**

Date	Event Name	Follow-up	
Dec 8, 2020	<a href="#">Test 123</a>	Follow-up Required	
Dec 8, 2020	<a href="#">TEST ABC</a>	Completed	

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# Other Tips for SHIPtools Outreach/Media Events:

- When you choose Event Type, you will be allowed to enter number of people contacted.
- If you use Event Type – Calendar Only, check the box for your organization only and this will display on your counselor's Home Tab Calendar. You do not want to share information with all state-wide counselors that only relates to your organization.
- You must fill in all areas with red/pink highlights, they are required fields. If all fields are completed, the contact will show as Approved on Contact Tab. If not completed, it will show as Follow-up Required and will need to be adjusted before it will upload. You can put in an event in advance and complete the detail information at a later date.

**And please remember to put information of what you discussed in Description Box!!**

# TEAM TAB:

You will find your totals for Contacts, Counseling Hours, Events, Trainings attended and (coming soon) Training hours!

All under the Qualifications tab!

The screenshot shows the MCH/CLAIM website interface. At the top, there are logos for CLAIM (State Health Insurance Assistance Program) and DCI (Missouri Department of Commerce & Insurance). The main header reads "MCH/CLAIM STATE HEALTH INSURANCE ASSISTANCE PROGRAM". A navigation menu includes: HOME, REFERRALS, CLIENTS, EVENTS, ACTIVITIES, TRAININGS, REPORTS, TEAM, and MANAGEMENT. The "TEAM" tab is selected and highlighted. Below the navigation, the page title is "Team". A red arrow points to the "TEAM" tab in the navigation menu. Another red arrow points to the "Qualifications" sub-tab under the user profile "Cindy Carr". The "Qualifications" sub-tab is active, showing two summary tables: "CCFs Completed" and "Presentations Completed".

Most recent CCF	<a href="#">November 24, 2020</a>
Total CCFs this year	1
Total CCFs previous year	0
Total counseling hours this year	2
Total counseling hours previous year	0

Most recent Presentation	<a href="#">December 11, 2020</a>
Total Presentations this year	28
Total Presentations previous year	0
Total Presentation hours this year	13.5



Q & A

You have

Questions

We have

Answers

# Special request:

Do you fluently speak any other languages other than English?  
Here are some SHIPtools examples:

Language	<input type="checkbox"/>	English	<input type="checkbox"/>	French	<input type="checkbox"/>	Portuguese
Fluency	<input type="checkbox"/>	American Sign Language	<input type="checkbox"/>	Greek	<input type="checkbox"/>	Russian
	<input type="checkbox"/>	Arabic	<input type="checkbox"/>	Haitian- Creole	<input type="checkbox"/>	Spanish
	<input type="checkbox"/>	Armenian	<input type="checkbox"/>	Italian	<input type="checkbox"/>	Tagalog
	<input type="checkbox"/>	Chinese	<input type="checkbox"/>	Korean	<input type="checkbox"/>	Vietnamese
	<input type="checkbox"/>	Farsi	<input type="checkbox"/>	Polish	<input type="checkbox"/>	Other

If so, please send an email to your Regional Liaison with what languages you speak. If it is not on the list, let them know!

Thank you for your help during  
this transition!

For questions/comments: [ccarr@primarisfoundation.org](mailto:ccarr@primarisfoundation.org)

Or contact your Regional Liaison