



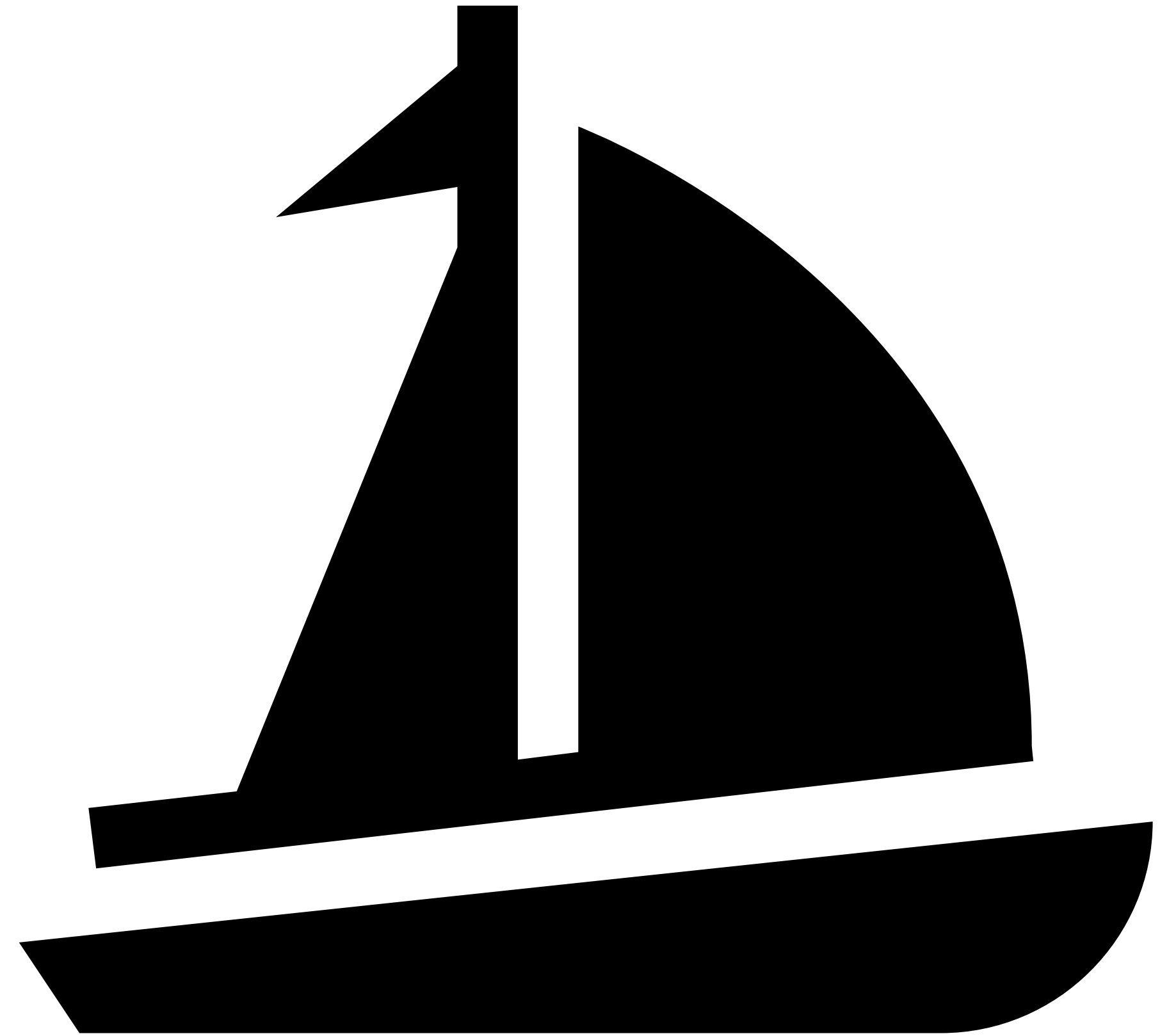
SHIPtools - Volunteer Questions and Review

6.17.2021



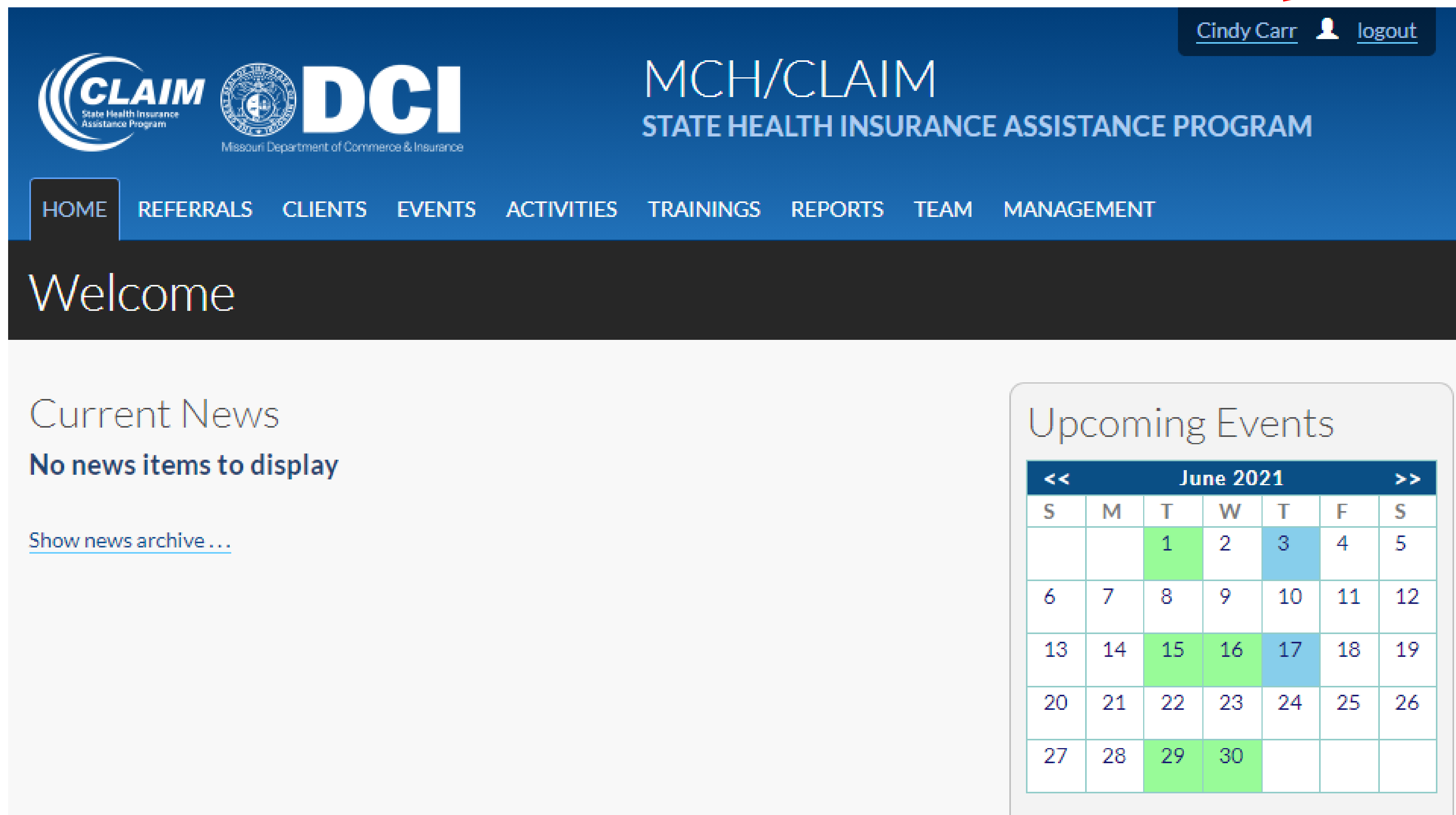
What you will learn:

- Review of Volunteer personal updates
- Volunteer Questions on SHIPtools
- Helpful Hints
- General updates
- Q&A




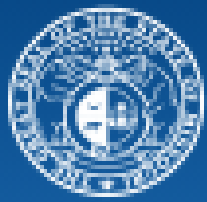
HOME Tab

1) If your personal information changes (email, phone number, address) please update your records.



The screenshot shows the MCH/CLAIM website interface. At the top right, a user profile for 'Cindy Carr' is visible with a 'logout' link. The main navigation menu includes 'HOME', 'REFERRALS', 'CLIENTS', 'EVENTS', 'ACTIVITIES', 'TRAININGS', 'REPORTS', 'TEAM', and 'MANAGEMENT'. The 'HOME' tab is currently selected. Below the navigation, a 'Welcome' message is displayed. The 'Current News' section indicates 'No news items to display' and provides a link to 'Show news archive...'. On the right side, there is an 'Upcoming Events' section featuring a calendar for June 2021. The calendar shows dates from 1 to 30, with the 1st, 15th, and 29th highlighted in green, and the 3rd, 17th, and 24th highlighted in blue.

Cindy Carr  [logout](#)

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

Welcome

Current News
No news items to display
[Show news archive...](#)

Upcoming Events

June 2021						
<<						>>
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			

HOME Tab

2) If you have **Follow-Up Required** listed on your **HOME** tab, you should click on the name and mark it as **No Action Required** in the Client Notes when completed.

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 TEAM

Welcome

My Notes

Follow-Up By	Client Name	Last Updated	Client Note Status
	Marilyn Jones	2/27/2021	Follow-up required
	Beverly Byrd	1/22/2021	Follow-up required
	Diane Pierce	1/25/2021	Follow-up required
	Lenora Cook	3/8/2021	Follow-up required
	Diane Pierce	3/9/2021	Follow-up required


Client Notes

Updated By	Assigned To	Status	Note	File
Cindy Carr (5/30/2021)	Cindy Carr	Follow-up required	3/15/21 - Bene phoned with questions re Essence MAPD materials rec'd: 1) Needs Member ID to fill out requested Needs Assessment form. Determined this is Essence Member ID; 2) Rec'd MedImpact Rx drug order form . Does she need to complete/submit? Determined this is mail order Rx drug form. She's using CVS so doesn't need to fill out now; 3) \$90 allowance from Essence for non-Rx items in	show history

HOME/CLIENTS Tab

3) Making a Client Contact will not close this **Follow-up Status**. You will need to manually close it. This can be done on **HOME** or **CLIENT** tab.

Client Notes

Updated By	Assigned To	Status	Note	File
Cindy Carr (5/30/2021)	Cindy Carr	Follow-up required	3/15/21 - Bene phoned with questions re Essence MAPD materials rec'd: 1) Needs Member ID to fill out requested Needs Assessment form. Determined this is Essence Member ID; 2) Rec'd MedImpact Rx drug order form . Does she need to complete/submit? Determined this is mail order Rx drug form. She's using CVS so doesn't need to fill out now; 3) \$90 allowance from Essence for non-Rx items in	show history 



Client Note

Status: No action required

Priority: -- Select One --

Assigned To: Cindy Carr

Follow-up By: [] [Calendar icon]

Notes: **B I U S** [List icons] [Undo/Redo] [Link/Unlink]

3/15/21 - Bene phoned with questions re Essence MAPD materials rec'd: 1) Needs Member ID to fill out requested Needs Assessment form. Determined this is Essence Member ID; 2) Rec'd MedImpact Rx drug order form . Does she need to complete/submit? Determined this is mail



**Please do not use “Follow-up by supervisor” unless you let them know you have assigned this to them!
Your Assigned Supervisor may not check SHIPtools regularly!**

REFERRALS

Tab

1) Volunteers should not use Canceled option! Call Center use only.

2) Remember to use Closed/Client did not return.... After making the 3 attempts.

Referral

Referral Status

- Open
- Materials Request Only
- Client Contacted
- Closed
- Canceled

Resolution

- Client did not return emails or phone calls
- Answered general questions
- Appointment scheduled
- Counseled client (created CCF)
- Distributed materials
- Referred to an External Agency
- Other

Notes

Saint Louis County - Would like to reveiw her enrollment in the Medicare Plans including the Part D Plan - MRM

Referral

Referral Status

- Open
- Materials Request Only
- Client Contacted
- Closed
- Canceled

Resolution

- Client did not return emails or phone calls
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- Referred to an External Agency
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Notes

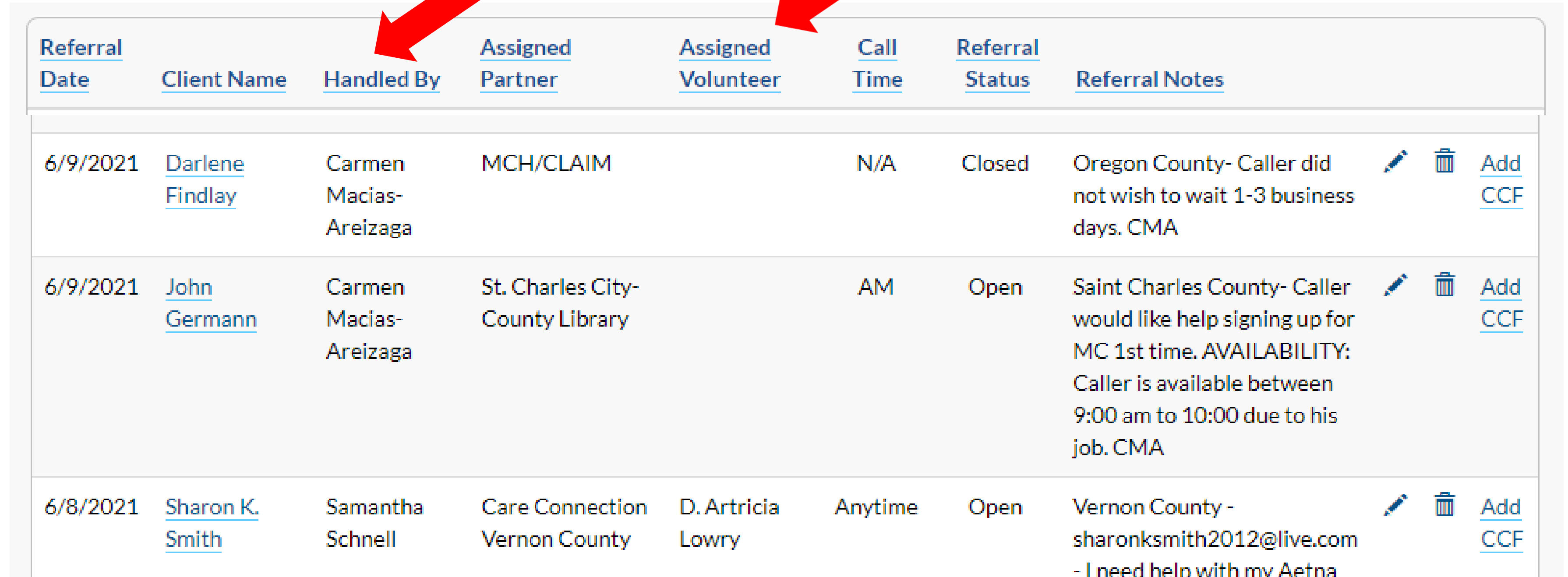
Saint Louis County - Would like to reveiw her enrollment in the Medicare Plans including the 6/5/21 10:00am called no answer, 6/6/21 9:30am called no answer, 6/9/21 10:30am called no answer. cc







REFERRALS

Tab

3) The “Handled By” column only shows who touched referral last.

4) The “Assigned Volunteer” column shows who the referral has been assigned to.



<u>Referral Date</u>	<u>Client Name</u>	<u>Handled By</u>	<u>Assigned Partner</u>	<u>Assigned Volunteer</u>	<u>Call Time</u>	<u>Referral Status</u>	<u>Referral Notes</u>			<u>Add CCF</u>
6/9/2021	Darlene Findlay	Carmen Macias-Areizaga	MCH/CLAIM		N/A	Closed	Oregon County- Caller did not wish to wait 1-3 business days. CMA			Add CCF
6/9/2021	John Germann	Carmen Macias-Areizaga	St. Charles City-County Library		AM	Open	Saint Charles County- Caller would like help signing up for MC 1st time. AVAILABILITY: Caller is available between 9:00 am to 10:00 due to his job. CMA			Add CCF
6/8/2021	Sharon K. Smith	Samantha Schnell	Care Connection Vernon County	D. Artricia Lowry	Anytime	Open	Vernon County - sharonksmith2012@live.com - I need help with mv Aetna			Add CCF

CLIENTS Tab

1) When you open the CLIENTS tab, it lists all your contacts.

2) To add another contact to the same client, click on client's name.

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

Clients

Show Client Notes

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

Counselor: Carr, Cindy

Show incomplete CCFs:

Add Filter

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

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

FIND

ADD NEW CLIENT

Client Name	Contact Date	Counselor	Approved	Export Status
Allen, Peggy	Feb 22, 2021	Carr, Cindy	Approved	
Bishop, Patsy	Feb 22, 2021	Carr, Cindy	Approved	
Brewner, Patricia	Feb 22, 2021	Carr, Cindy	Approved	

CLIENTS Tab

3) Click on Add Client Contact button to add a new contact for the same person.

4) You can also Add Couples Contact too!

5) This way Demographics are already filled out.

Client Contacts

Date	Type	Counselor's Name	Duration	Exported
February 22, 2021	In-Person / Event	Cindy Carr	30 minutes	

[Add Client Contact](#) [Add Couples Contact](#)

Demographics

Collected on February 22, 2021

Date of birth:	65-74	Annual Income:	Below 150% of FPL
Gender:	Female	Medicare Disabled:	No
Primary Language:	English	Ethnicity/Race:	White, Not of Hispanic origin
Asset Limits:	Below LIS Asset Limits	Veteran Status:	n/a

[Update Demographics](#)

CLIENTS Tab

6) To EDIT time or information on an existing client contact, click on client's name, date of contact, then **EDIT** button.

7) Remember to **SAVE** after any changes.

ADD NEW CLIENT

Client Name	Contact Date	Counselor	Approved	Export Status
Allen, Peggy	Feb 22, 2021	Carr, Cindy	Approved	
Bishop, Patsy	Feb 22, 2021	Carr, Cindy	Approved	
Brewner, Patricia	Feb 22, 2021	Carr, Cindy	Approved	
Brown, Jason	Apr 15, 2021	Carr, Cindy	Approved	

Client Contacts

Date	Type	Counselor's Name	Duration	Exported
February 22, 2021	In-Person (site)/event	Cindy Carr	30 minutes	

Add Client Contact **Add Couples Contact**

Client Details **Edit** **Delete** **Print**

1 SHIP Counselors

Counselor	Cindy (14324) Carr	Data Submitter	Cindy Carr
Co-Counselor		Counseling Zip Code	65201
Organization	MCH/CLAIM	Counseling County	Boone

2 Client Information

Client Name	Patricia Brewner	Home Phone	(573) 557-4025
Client Address	102 B Willow Creek	Mobile Phone	
City, State, Zip	Eldon, MO 65026	Other Phone	

Difference in Notes: Referrals/Client/Contact



Referral Notes:

Used to track Open, Client Contacted or No Contact Referrals for **CLAIM/Site/Volunteer** use.



Referrals

Referral Date	Assigned Partner	Assigned Volunteer	Referral Status	Resolution	CCF Date	Notes
4/14/2021	MCH/CLAIM	Cindy Carr	Closed	Counseled client (created CCF)	4/26/2021	Cindy Carr will handle this one! CC Called 4-19-21. Caller will call back next week to set up an appointment. CC NOTE: Caller called back and she stated that she will not be available this week but she will next week. CMA ORIGINAL MESSAGE: Boone County - Would like to have a one on one meeting to review her Medicare, Medicaid and SSI Programs - She requested a Counselor other than the counselor that had tried to contact her earlier - Jim House - MRM close

Client Notes:

Used when Follow-Up is needed after creating a Contact for **Partner/Volunteer** Use. Shows up on HOME tab.



Client Notes

Updated By	Assigned To	Status	Note	File
Cindy Carr (5/30/2021)	Cindy Carr	Follow-up required	3/15/21 - Bene phoned with questions re Essence MAPD materials rec'd: 1) Needs Member ID to fill out requested Needs Assessment form. Determined this is Essence Member ID; 2) Rec'd MedImpact Rx drug order form . Does she need to complete/submit? Determined this is mail order Rx drug form. She's using CVS so doesn't need to fill out now; 3) \$90 allowance from Essence for non-Rx items in	show history

Contact Notes:

Used to report to **STARS** what was done to assist the client.



10 Notes

Originated from Referral on April 14, 2021
Comments Discussed Medicare options. Client did not understand who pays for what part. Does not qualify for Extra Help or MSP at this time.

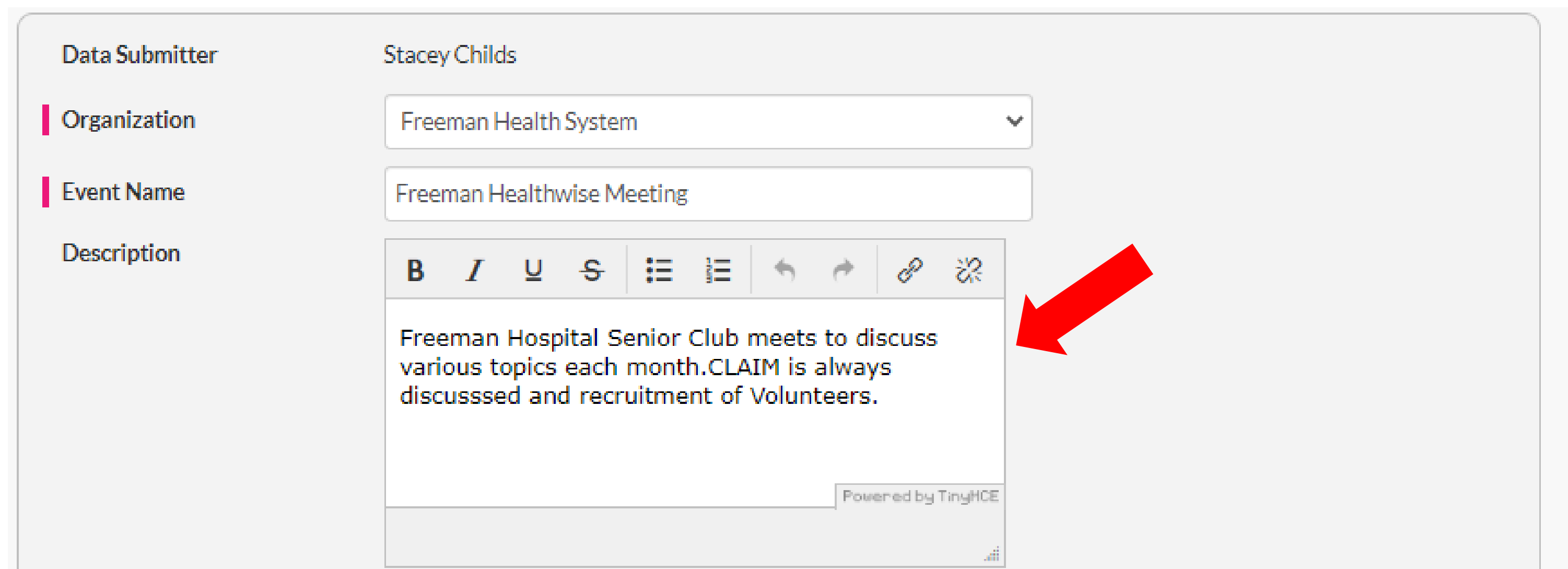
EVENTS Tab

1) Better naming of events: Please use Partner site or county in name.

ADD NEW EVENT		
Date	Event Name	Follow-up
May 25, 2021	Freeman Healthwise Meeting	Completed
May 25, 2021	Services and Medicare	Completed
May 25, 2021	Fellowship of Christian Women Presentation	Completed
May 25, 2021	Community Education: SMP "Can They Do That?"	Completed
May 25, 2021	CLAIM Marketing Event with APPLE	Completed
May 24, 2021	In Home Service Provider Info to Share	Completed
May 24, 2021	Mercy face to face with hospital participants	Completed
May 24, 2021	Medicare Bingo	Completed
May 20, 2021	National Welcome to Medicare Event NPR Interview...	Completed
May 20, 2021	Dallas County Resource Group	Completed
May 19, 2021	Daviness County Food Pantry Outreach	Completed
May 19, 2021	Professional Training Program	Completed
May 19, 2021	Medicare Workshop for Professionals	Completed
May 18, 2021	MoLagers Medicare State-Wide Presentation	Completed
May 18, 2021	LIS and MSP Programs	Completed
May 18, 2021	CLAIM Information	Completed
May 17, 2021	CLAIM Outreach	Completed
May 17, 2021	Age Spots Article on Preventive Services in Medi...	Completed
May 17, 2021	30th Annual Aging w/Disability Conf	Completed
May 14, 2021	Prevention & Wellness Call Center Monthly Survey...	Completed
May 12, 2021	Affinial Annual Dental Exam for Seniors	Completed
May 11, 2021	Medicare Basics	Completed
May 10, 2021	College Outreach (Department NMMO)	Completed

EVENTS Tab


2) Add brief, basic description of the event in the Description Box.



The screenshot shows a form for adding an event. The 'Data Submitter' is 'Stacey Childs'. The 'Organization' is 'Freeman Health System'. The 'Event Name' is 'Freeman Healthwise Meeting'. The 'Description' box contains the text: 'Freeman Hospital Senior Club meets to discuss various topics each month. CLAIM is always discussed and recruitment of Volunteers.' A red arrow points to the description box. The form is powered by TinyMCE.

3) Remember to follow-up after the event: Add Time, Counts, etc. for upload to STARS.

Date	Event Name	Follow-up
May 4, 2021	College Outreach/Recruitment	Completed
May 4, 2021	College Outreach/Recruitment	Completed
May 4, 2021	College Outreach/Recruitment: - UMKC	Completed
May 4, 2021	NAACP Volunteer /AC recruitment	Completed
May 4, 2021	Ministerial Alliance	Completed
May 3, 2021	Advance Senior Health and Resource Fair	Completed
May 3, 2021	Cooper County Human Resources Meeting	Completed
May 1, 2021	COVID-19 Mask Volunteer Community Outreach Proje...	Completed
Apr 30, 2021	Call Center Daily Mailing Project Summary	Completed
Apr 30, 2021	St. Louis Service Coordinators Coalition Meeting...	Completed
Apr 30, 2021	YouTube Outreach Video	Completed
Apr 30, 2021	Newsletter	Completed
Apr 30, 2021	Affinia Dental Day	Follow-up Required



EVENTS Tab

4) To add Material Distribution, use Other and put Material Distribution in the box.

Add an Event

Data Submitter

Cindy Carr

Organization

MCH/CLAIM

Event Name

Test for Volunteers

Description

B *I* U ~~S~~      

Test to show how to put Material Distribution in SHIPtools

Powered by TinyMCE

p

Vendor Fees

Event Type

Other

Material Distribution

Estimated Number of People Potentially Reached

Geographic Coverage

-- Select One --

New Important Information on Client Contacts!!!

Starting Immediately!

If you are entering an amount in the **Savings Box** on the contact form for a **Part D or MA Plan**, it must be accompanied with the backup.

- 1) Save the PlanFinder Documents and Enrollment confirmation in a secure file or computer.
- 2) Put in the date of Current Plan and New Plan
- 3) Click on Choose File button to attach the files.
- 4) When you put in the cost of old/new plan, the system will figure the savings for you.

If the backup is not included with the cost savings, CLAIM staff will have to remove the cost savings when uploaded in STARS!!

32 Enrollment \$ 137.1

BOTH the Plan Comparisons and Enrollment Confirmation statements below must be checked to report savings.

Before & After Comparisons on file:

Current Plan Document

6/11/2021 2021 1st Trai...MPLATE.docx

New Plan Document

7/1/2021 2021 2nd IVT Email.docx

Enrollment Confirmation on file:

Confirmation Document

6/11/2021 2021 Zoom Invite.docx

PDP/MA-PD Before \$ 157.40

PDP/MA-PD After \$ 20.30

33 Plan Non-Renewal

SHIPtools Helpful Hints

- The website will be located at www.SHIPtools.org/mo
- If your system is entering (shadowing) information when filling out the contact form, please clean your cache! Instructions are on www.missouricclaim.org under the volunteer resources.
- You can use your back arrow on the top left of your internet browser to go back to the previous list.
- Remember to do the oldest referrals first. You can sort for oldest first by clicking on the date column header.
- Check your yearly commitment totals regularly (TEAMS tab) to see if you are meeting your contacts/training numbers for certification.

General Updates:

- Uploads to STARS soon!
- CLAIM WATCH newsletter
- Last New Volunteer Training for 2021

*Thank
you!*

For questions/comments:

ccarr@moconnectionsforhealth.org
twhitney@moconnectionsforhealth.org

Or contact your Regional Liaison