



Chapter 1: Introduction

The CMS Office of the Medicare Ombudsman (OMO) is charged with working with the State Health Insurance Assistance Programs (SHIPs) to facilitate the provision of information to people with Medicare. Specifically, the goal of the CMS OMO is to assist SHIPs and other community partners to build bridges and expand the network of help for beneficiaries in vulnerable populations such as people with mental illness, with the intent of raising awareness and facilitating the provision of Medicare benefit information to these populations.

CMS is meeting this goal for people with mental illness by developing and implementing a SHIP Technical Assistance Program (SHIP TAP) according to the following guiding principles. The SHIP TAP must:

- ❖ Be a sustainable model that can be applied to diverse vulnerable populations,
- ❖ Complement (not duplicate) existing programs,
- ❖ Be developed in collaboration with SHIPs and their designated partners, and
- ❖ Be implemented incrementally.

Mental illness — which includes “health conditions that are characterized by alterations in thinking, mood, or behavior...associated with distress and/or impaired functioning” — afflicts **20% of every age group in the U.S.**, according to a recent report from the Surgeon General (*Mental Health: A Report of the Surgeon General*, Rockville, MD: U.S. Department of Health and Human Services, 1999). The stigma associated with having a mental illness, along with a lack of understanding of and sensitivity to issues associated with mental illness, is one of the primary reasons why this population is vulnerable and underserved.

The 2004 Medicare Current Beneficiary Survey provides data on the number of people with Medicare benefits who suffer from a mental illness. According to that survey:

- ❖ “For people with Medicare under 65 years and disabled - 53% report having been told they have a mental or psychiatric disorder;
- ❖ For people with Medicare over 65 and not disabled - 12% report having been told they have a mental or psychiatric disorder.”

The data above suggests that SHIP counselors are likely to encounter mental illness among the people whom they regularly assist. SHIP counselors are also likely to encounter mental illness as they reach out to younger, disabled groups. These younger individuals may not be aware of SHIP services; for example, they are not likely to use community resources such as senior centers where SHIP services are available.



Although counselors do assist people with a wide variety of Medicare questions, people with mental illness who live in the community may need extra support in navigating decisions. Depression, cognitive impairment, and other manifestations of mental illness may make decision-making more difficult. People with mental illness may also face other unique issues that require more SHIP counselor support, such as high co-payments, prior authorizations, or other limits for drugs prescribed for mental illness. All of these factors can make tasks like selecting a prescription drug plan seem particularly daunting for people with mental illness. The SHIP TAP was developed to:

- ❖ Enhance the experience of people with mental illness in relation to accessing information associated with their Medicare benefits.
- ❖ Provide information on the types of support that people with mental illness may need to make Medicare benefit decisions.
- ❖ Solidify relationships between SHIPs and local mental health partners.
- ❖ Facilitate targeted outreach by SHIPs to people with mental illness who have Medicare benefits.

Closing Gaps: A Three-Pronged Approach

This guide documents a three-pronged approach to closing the gaps identified by a needs assessment conducted by the OMO with SHIP staff and mental health professionals during 2006 and helping people with mental illness. The guide is intended for use by SHIP Directors and will provide strategies to:

- ❖ Expand SHIP networks to include mental health partners,
- ❖ Promote sensitivity and awareness among counselors through training, and
- ❖ Conduct more targeted outreach to people with mental illness.

The materials included in this guide and accompanying CD broadly target each area of this approach. You can use this guide to lead SHIP counselors in their efforts to provide benefits counseling and decision support to beneficiaries with mental illnesses. **Your leadership, as well as the participation and support of everyone in the SHIP organization, is essential to meeting your goals of excellent service.**

You will use the materials provided for each prong of the SHIP TAP differently. Each set of materials has a different purpose and a different audience.



Prong 1: Conducting Network Expansion Activities (Chapter 2)

The Network Expansion materials are intended for SHIP Directors and for the individuals you assign to lead network expansion efforts in your state. Use the PowerPoint presentation and marketing materials included in this guide to implement network expansion through conference calls and a face-to-face meetings with potential network partners.

Prong 2: Enhancing Sensitivity and Awareness (Chapter 3)

The Sensitivity and Awareness materials comprise formal structured training for SHIP counselors. They include seven tip sheets and fact sheets, a PowerPoint training presentation and a set of training activities. As SHIP Directors, you are expected to distribute these materials to your training organizations for classroom or web-based presentation to SHIP counselors.

Prong 3: Outreach (Chapter 4)

The Outreach materials included in this guide are intended to help you develop an action plan for reaching out to people with Medicare who have mental illness.

Selecting TAP Materials for Your State

The materials included in this guide provide a scalable approach to introducing concepts around sensitivity and awareness of mental illness and a repeatable process for expanding networks, and conducting outreach. The materials were designed in a modular fashion. You can use them as you see fit based on your state's particular needs. If you already have a well-developed multidisciplinary network that includes mental health care professionals, for example, you may choose to implement the Sensitivity and Awareness training but not the Network Expansion activities.

If, on the other hand, professional networks in your state need expansion, you will find a great deal of help in the SHIP TAP materials. The Network Expansion toolkit (see Chapter 3) consists of materials that provide strategic and logistical guidance for two conference calls leading up to a face-to-face session.

The Sensitivity and Awareness training divides the seven tip and fact sheets included in the materials into three sections. Based on the needs of your organization and which tip/fact sheets you think will be useful for your counselors, you can choose to provide only one or two sections of the Sensitivity and Awareness training.

The Outreach chapter (see Chapter 4) provides guidelines for expanding outreach to people with mental illness. This chapter will help you develop an action plan for reaching out to people where they go as part of their normal routine, like the pharmacy, and ensuring that mental health partners know about SHIP and the services it provides.



Implementing SHIP TAP to Support Vulnerable Populations

In implementing SHIP TAP in your state, you need to:

- ❖ Convey your support and “buy-in” for this effort to build bridges and expand the network of help for people with mental illnesses.

Your active support will demonstrate the importance you place on meeting the needs of the mentally ill. That clear message will encourage members of your organization as well as your partners to devote the time and energy necessary to network, reach out to this population, and raise the level of sensitivity to issues associated with mental illness.

- ❖ Identify which components of the SHIP TAP program that you need to implement in your state.

By selecting program components for your state, you provide a mandate for implementing those components in the near term.

- ❖ Ensure members of your organization have access to the SHIP TAP materials.

SHIP Directors are the first audience for this guide and the associated toolkits. The guide is organized so that you can share relevant chapters with different members of your organization. In addition, because you have the toolkits on CD, you can easily e-mail the materials to other members of your organization.

- ❖ Actively participate in the training included as part of the SHIP TAP.

Your participation in the training would be a vivid demonstration of your support and buy-in for this effort.

CMS welcomes your feedback on this TAP to enable continuous process improvement for our outreach support initiatives. Figure 1-1 provides a contact for submission of feedback or questions related to SHIP TAP.

Figure 1-1: CMS Contact Information

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