



Chapter 3: Enhancing Sensitivity and Awareness

Introduction

This chapter introduces the Sensitivity and Awareness training and tip/fact sheets developed as part of the CMS State Health Insurance Assistance Program Technical Assistance Program (SHIP TAP). These materials are designed to raise awareness among SHIP counselors of the impact of mental illness, issues they may encounter when serving people with mental illness and to give them the tools to handle them effectively.

SHIP counselors are likely to encounter mental illness among the people whom they regularly assist. They are also likely to encounter younger, disabled individuals with mental illnesses who are transitioning from Medicaid to Medicare prescription drug coverage. Enhancing counselors' sensitivity regarding mental health issues provides benefits to numerous groups, including:

- ❖ **People with mental illnesses:** People with mental illnesses are more likely to get the help they need through a SHIP.
- ❖ **SHIP counselors:** Through the Sensitivity and Awareness training, counselors will be better prepared to manage conversations with people who have a mental illness.
- ❖ **SHIP organizations:** Volunteer counselors who feel prepared and effective are more likely to continue counseling.
- ❖ **Mental health partners and health care providers in the SHIP multidisciplinary network:** Mental health partners and health care providers will benefit by having SHIP counselors who are sensitive to mental health issues available to talk to people about their Medicare benefits.

SHIP TAP: Enhancing Awareness of Mental Illness Issues

Through the SHIP TAP program, CMS, along with its partners in the mental health community, has designed seven tip/fact sheets covering a range of facts on mental illness and strategies for conducting benefits counseling sessions. **SHIP counselors are not expected to diagnose mental illness.** These tip/fact sheets can be used as job aids by SHIP counsellors to handle situations they may encounter as part of their normal activities, in which the symptoms or issues associated with mental illness make benefits counseling and decision-support activities more complicated.



The tip/fact sheets are intended to help counselors:

- ❖ **Conduct more effective conversations:** Repetition of messages and reassurance that tasks can be completed one by one are two tips for counselors working with people with mental illnesses. In addition, counselors need to recognize and avoid the misconceptions about mental illness that are common in our society.
- ❖ **Focus on the most important issues:** For example, it is critical for people with mental illnesses to have access to the drugs they need through an affordable Medicare prescription drug plan. Many cannot afford high premium costs or co-payments, so their plan choices will be more limited. Also, people may have trouble filling their prescriptions because plans may require drugs typically prescribed for mental illness to go through prior authorization or step therapy.

CMS has created a Sensitivity and Awareness training program for sharing the tip and fact sheets with counselors. The tip and fact sheets are the foundation of the training program. They are grouped into the following modules to facilitate the presentation of material:

Introduction

Purpose: Provides an overview of the development of the TAP as well as basic facts about the impact of mental illness.

Mental Illnesses You May Encounter

Purpose: Provides basic information on the symptoms and causes for three mental illnesses common in this population along with simple tips for helping people who display these behaviors make benefit selections.

Fact Sheets:

- Depression
- Anxiety
- Dementia

Medicare Benefits Counseling for People with Mental Illness

Purpose: Provides strategies for effective benefits counseling for people with a mental illness, including tips that counselors can use to handle difficult conversations, differentiating



truth and fiction surrounding mental illness, and approaches to counseling beneficiaries who have been prescribed drugs in one of the classes commonly prescribed to treat mental illness.

Tip Sheets:

- Mental Illness Myths
- Counseling People with Mental Illness
- What Should You Do in a Difficult Conversation?
- Counseling People Who Take an Antipsychotic, Anticonvulsant, or Antidepressant

Connecting with Mental Health Resources

Purpose: Identifies strategies to assist counselors in learning about and connecting with local and national mental health resources.

You may present the entire slide set in a single training session or instead present one or two sections of the training. Regardless of the approach you select, you should always include the introductory section because it provides important background information.

You determine which sections to present based on the goals and structure of your state SHIP program, the topics that are the most appropriate to people with mental illness in your state, the time available for training, and the engagement of partners within the mental health community. Your trainer should clearly state how these materials should be applied in your program. For example, you should clearly identify any limits or protocols your SHIP counselors should observe for handling situations beyond normal benefits counseling.

The Sensitivity and Awareness training program more closely resembles a workshop rather than a lecture. Counselors and staff are encouraged to share their experiences and approaches they have found fruitful. Role playing is a very large component of the training, offering an engaging and powerful means of exploring different approaches to a particular challenge, such as a confused, anxious person with mental illness who is attempting to select a Medicare prescription drug plan. This training is appropriate for experienced SHIP counselors or a mixed group of novice and experienced counselors. The training can be completed in 6 – 8 hours depending on the number of role plays you include and the amount of time you anticipate the audience will require to review the tip/fact sheets.



Presenting the Training

To present the Sensitivity and Awareness training, you need to consider how you are going to assign roles and responsibilities (e.g., identify a trainer, planning and coordination of the event), define whether the training will be presented in person or via the web, and decide on the appropriate timing. Figure 3-1 provides some tips for conducting this training.

*There is a great deal of information in the notes portions of the slides. Be sure to display the presentation with notes displayed (on the **View** menu, select either **Normal** or **Notes Page** to see the notes). You may also want to print the presentation with notes displayed in preparation for a meeting (on the **File** menu, select **Print**; then select **Notes Pages** from the **Print what** drop-down list).*

You have two choices for displaying the presentation during the training:

1. Open the presentation to the correct opening slide for the day (Sensitivity and Awareness slides).
2. Copy the entire presentation and then delete the slides you will not need from the copy. At times, when you copy slides from PowerPoint and then paste them into a new PowerPoint file, you will notice changes in the slide layout. That is because a different slide template is being applied to the slides. Copying the entire file and deleting the slides you do not need is often a faster approach.

Figure 3-1. Tips for Sensitivity and Awareness Training

- *Read and absorb the tip and fact sheets before the training.*
- *Ensure the technology you are using does not get in your way. Practice running a webinar, for example, or be sure you know how to use a projector to display the slides.*
- *Get everyone involved. Ask people for their opinions if they seem uninvolved.*
- *Get feedback as you go along. Ask the attendees whether the conversations and role plays are “working” (if you are having trouble getting people to participate or the role plays are not sparking animated conversation, you may need to change your approach.)*
- *Tell stories and ask others to tell stories. Stories are memorable and one of the best ways to convey a point.*
- *Use the training as an opportunity to develop camaraderie among the counselors.*
- *Present materials, ideas, and interactions that are best suited to your audience.*
- *Be aware that you are using materials developed, reviewed, and approved by CMS and their partners with mental health expertise. Stay true to the intent of these materials.*

Assigning Roles and Responsibilities

You will need the support of a logistics coordinator and trainer to implement the sensitivity and awareness training. The roles and responsibilities associated with each position are highlighted below.

The logistics coordinator handles the tasks associated with:

- ❖ Contacting training participants,
- ❖ Scheduling a training date or dates,
- ❖ Documenting useful approaches to counseling sessions that are discussed during the training and distributing this information to attendees after the training,
- ❖ Documenting phone numbers that are mentioned during the training, and
- ❖ Gathering feedback from training participants.



The trainer is responsible for:

- ❖ Working with the SHIP Director to ensure local policies are accurately incorporated into the training.
- ❖ Understanding and sharing the materials.
- ❖ Conducting the limited research specified in the presentation related to local mental health resources.
- ❖ Guiding several role plays and other training activities.

Setting Up and Running a Webinar

There are advantages to both approaches to presenting this training: in person and via webinar. A “webinar” means a presentation or training provided via the web. Typically, the presenter displays slides or documents, which attendees view on their computers. With some web presentation tools, attendees call into a separate conference number to converse; other tools use voice over IP (Internet Protocol), which means that the computer conveys the conversation rather than the telephone.

Here are some tips to ensure a webinar presentation of the Sensitivity and Awareness training is successful:

- ❖ If you are inexperienced at running a webinar, set up and run a practice webinar with colleagues in several locations.
- ❖ Determine whether the webinar service sends out e-mails to all participants.
- ❖ Determine whether attendees need to install software plug-ins and whether there are any browser requirements.
- ❖ Explore the different ways that attendees can participate during a webinar. For example, most webinar tools have a mechanism for “raising your hand” and sending e-mails to the presenter to ask questions.
- ❖ Practice sharing the PowerPoint presentation so everyone can view it.
- ❖ Practice hiding and displaying webinar toolbars. Often webinar attendees will want to hide toolbars so they have a larger view of your screen. Ask your colleagues participating in the trial webinar what they see and whether there are any toolbars they would like to move.
- ❖ Arrive early at the webinar. Moderators of webinars should arrive early to greet attendees as they arrive.
- ❖ Do not forget introductions. Attendees will be working closely together during the training. It is just as important to conduct a round of introductions during a webinar as during in-person training.

- ❖ Keep an eye on the clock. The conversations and role plays during the training are open-ended and could catalyze long discussions among attendees. It is your responsibility to ensure that the training moves forward and is completed in the timeframe announced in the webinar invitation.
- ❖ Have a training coordinator help with the webinar, keeping track of attendees' level of participation, answering e-mail messages, and documenting the conversation.
- ❖ Consider recording the training session. Most webinar services provide an option for recording the conversation. Counselors may find it useful to listen to the recording, either if they want to review the content or if they missed the webinar. Explain how the recording would be used and ask attendees whether they would be willing to have the sessions recorded. If attendees are not willing to be recorded or it is clear that some attendees may be less than candid during the training if it is recorded, you should not make the recording.
- ❖ Have the technical support number for the webinar service handy during the training.

Timeline

Table 3-1 will help you with the mechanics of setting up the Sensitivity and Awareness training.

Table 3-1. Sensitivity and Awareness Training Logistics Tasks

Task	Timing Relative to Training	Notes
Select an approach to the training (in person or webinar)	6-10 weeks in advance	<ul style="list-style-type: none"> • For in-person training, schedule a training location. • If you need to purchase a webinar service (for this and other presentations), conduct research on the different options.
Develop an agenda	4-6 weeks in advance	<ul style="list-style-type: none"> • Determine what sections of the training you are going to present. • Identify the trainer who will present the training. • Identify who will take notes during the training. • Develop an agenda based on how much time will be spent on each section, the number of role plays you plan to conduct, and when the breaks will occur.



Table 3-1. Sensitivity and Awareness Training (cont.)

Task	Timing Relative to Training	Notes
Invite attendees and provide logistics details	4-6 weeks in advance	<ul style="list-style-type: none">• Communicate logistics details for an in-person meeting (meeting location, directions, time, agenda, objectives as well as travel and lodging, if needed).• Communicate logistics details for the webinar, including:<ul style="list-style-type: none">○ URL,○ Conference phone number (if any),○ Explanation of any software plug-ins that will need to be installed, and○ Request that attendees join the webinar 10 minutes early to attend to the details of joining.
Practice, as necessary	1-2 weeks in advance	<ul style="list-style-type: none">• For a webinar, set up and run a short practice webinar. Ensure you are comfortable with the software and how you perform different functions (such as sharing the PowerPoint presentation or raising your hand as a training attendee).• For an in-person training session, conduct whatever practice you feel is necessary to run a training workshop with role plays. For example, you may want to ask colleagues to participate in a practice role play.
Document the training session	During the training	<ul style="list-style-type: none">• Ensure the note taker, such as the training coordinator, is taking notes during the session.• If everyone agrees, record the session.
Request feedback	At the end of the session	<ul style="list-style-type: none">• Request immediate feedback as well as more extensive feedback via e-mail or phone call. Provide a date by which you would like feedback.
Distribute notes and consolidated feedback	After the training	<ul style="list-style-type: none">• Distribute notes and consolidated feedback. You may also want to suggest a mechanism for counselors to share tips and stories after the training.

Running Role Plays

Role plays are effective only if they create a sense of reality. If role players read the scripts that are provided with the training as if they were reading pages of a book, the role plays will be dull. You want the activities to evoke a sense of recognition from attendees (e.g., “that’s happened to



me”). Your goal is for role players to act their parts, based on their own experience and directed by the script, rather than merely to read. Because of the nature of this material, it is also important the role plays be conducted with a great deal of sensitivity.

Choose role players whom you feel will be comfortable with this challenge. If you are presenting the training via a webinar, you will also want to ensure that the role players sound very different from each other so attendees can tell the different voices apart.

Toolkit for Enhancing Sensitivity and Awareness

Printouts of the toolkit are located in Appendix B and electronic copies can be found on the accompanying CD. The documents contained in the toolkit are as follows:

- 1. Sensitivity and Awareness Training Slides: Presentation slides and facilitator notes for the training.**
- 2. Training Activities:** Instructions and scripts for implementing role plays and other training activities.
- 3. Fact and Tip Sheets:** Job aids for SHIP counselors who participate in the training on the following topics:
 - Mental Illness Myths
 - Counseling People with a Mental Illness
 - What should you do in a Difficult Conversation?
 - Counseling People who Take an Antipsychotic, Anticonvulsant, or Antidepressant
 - Depression
 - Anxiety
 - Dementia

A printout of the opening slide is shown in Figure 3-2. Look on the accompanying CD for the Sensitivity and Awareness PowerPoint file, the training activities and the tip/fact sheets.

Figure 3-2. Opening Slide of the Sensitivity and Awareness Training



Summary

With increased sensitivity to issues associated with mental illnesses, SHIP counselors will be able to conduct more effective conversations. The presentation of the Sensitivity and Awareness training in workshop format provides counselors with a forum for telling stories from their experiences, sharing tips and approaches that have worked for them, and learning more about the challenges associated with helping people select Medicare benefits. Most importantly, the tip and fact sheets serve as both starting points for discussion and as job aids counselors can use to easily access the information provided during the training.