



# Chapter 4: Outreach

## Introduction

This chapter provides guidelines for conducting outreach to people with mental illness who have Medicare benefits. These guidelines were developed as part of the CMS State Health Insurance Assistance Program Technical Assistance Program (SHIP TAP). As SHIP Directors, you are adept at reaching out to people with Medicare. However, as you reach out to new populations, including those with mental illness, you must:

- ❖ Identify areas that would benefit from redirected outreach,
- ❖ Identify new partners who would benefit from receiving materials on the SHIP program and specifically on mental illness, and
- ❖ Figure out how to repurpose existing Medicare materials (for example, for people with Medicare benefits under the age of 65) and distribute those materials in new ways (so that people under the age of 65 will become more aware of the SHIP program).

This chapter on outreach will help you complete these tasks. The chapter:

- ❖ Includes background on how additional outreach would meet the needs of this population,
- ❖ Identifies the target audience and goals of an outreach effort,
- ❖ Identifies steps for the repurposing of existing materials or creating new materials to meet the needs of this population, and
- ❖ Provides an action plan for implementing this outreach program.

## Case Study for Outreach

Consider the following scenarios:

- ❖ A woman taking several medications for the treatment of a mental illness enters her usual pharmacy to pick up her prescriptions. She receives Medicaid, and has just become eligible for Medicare. She is not aware that she has been automatically enrolled in a Medicare prescription drug plan, and she is charged the full price for her prescriptions. She does not have the funds available to purchase her drugs. She is surprised and panicked by the news. Unsure of what to do, she leaves the pharmacy. She is unable to sleep, worrying about the next step she should take.



- ❖ A disabled person reaches out to his case worker at a mental health clinic for help in determining whether his Medicare prescription drug plan is meeting his needs. The case worker needs additional information to help him and isn't sure where to turn.

These are just two examples of situations in which people with mental illness need help in understanding their Medicare benefits. Many of these individuals — and their community mental health providers as well — may be unaware of SHIPs, what services SHIPs offer, and how to contact a local SHIP.

## Target Audience for Outreach Efforts

This chapter provides tips for reaching out to two groups of people:

- ❖ People with Medicare who are **over** the age of 65 and who need extra assistance because they are dealing with the symptoms of a mental illness (diagnosed or undiagnosed), and
- ❖ People with Medicare who are **under** 65 and who are dealing with the symptoms of a mental illness.

People with Medicare who are over the age of 65 may already interact with SHIP counselors at senior centers or other locations where older Americans typically seek assistance. People with Medicare who are under the age of 65 may not seek assistance at these locations and, as a result, they may have little exposure to SHIP counselors. Those who are aware of the counselors may not recognize that SHIPs serve people with Medicare who are under 65.

To most effectively reach people with a mental illness who have Medicare **when** and **where** they need help, SHIP organizations should reach out to the providers who would normally interact with people in need. These providers should include mental health organizations, pharmacies, hospital emergency rooms, urgent care centers, and social service agencies.

## Goals of These Outreach Guidelines

By implementing the tips and suggestions in this chapter, SHIP organizations will be able to:

- ❖ **Goal 1:** Reach out to people with a mental illness at locations where they already go as part of their normal routine. These locations include mental health clinics, pharmacies, and social service agencies.
- ❖ **Goal 2:** Provide reference information for this population, so they know whom to contact if they need assistance with Medicare after they leave the point of service.
- ❖ **Goal 3:** Ensure that healthcare providers for people with a mental illness who have Medicare know about SHIP, the services offered by the program, and how to contact a local SHIP counselor.

## Increased Utilization of Existing Outreach Materials

To maximize the effectiveness of outreach to people with mental illness, SHIP organizations should repurpose existing materials and distribute them in new ways, using the following recommended steps.

- 1. Identify mental health professionals who will partner** with the state SHIP organization. Use the network expansion process described in this guide (Chapter 2).
  - Distribute materials about SHIP to these partners.
  - Provide information on Medicare benefits that partners can easily use when people with mental illness need help solving a problem.
- 2. Identify other providers who regularly encounter people with mental illness** who have Medicare benefits. Providers to target include pharmacies, physician offices (particularly ones serving patients with mental illness, such as psychiatrists and psychologists), hospital emergency rooms, and urgent care centers.
  - Ensure these providers understand the mission and purpose of SHIP.
  - Offer handouts to be given to people with Medicare at the time of service.

## Future Development of Targeted Outreach Materials

SHIP organizations in different states may identify a need for additional materials to address situations that people with a mental illness who have Medicare encounter. For example, it might be useful to provide a list of steps that people with Medicare should follow if they are overcharged for a medication or if the pharmacy cannot fill a prescription.

Each SHIP organization can use the following tips to produce additional targeted materials:

- ❖ Encourage people with Medicare to keep information handy by providing it on wallet cards or refrigerator magnets.
- ❖ Get their attention with wall posters placed in areas such as pharmacies, physicians' offices, and hospital emergency rooms.
- ❖ Create new materials that focus on people with Medicare who are under 65 by using words and images that relate to their unique situation. Figure 4-1 provides sample images.

**Figure 4-1. Sample Images**



- ❖ Write new materials so that they are easily understood by people with a mental illness. This enables people with Medicare who have cognitive impairment and/or lower levels of education to use the materials. Figure 4-2 provides some tips for producing accessible materials.

**Figure 4-2. Tips for Producing Accessible Materials That Matter**

1. *Be concise, don't use extra words*
2. *Use bulleted lists rather than long narrative*
3. *Focus on the reader (what do they want to know)*
4. *Use active and personal voice*
5. *Break up sentences and paragraphs*
6. *Use simple vocabulary and sentence structure*
7. *Include pictures to illustrate points*
8. *Don't use childish phrases or images*
9. *Be relevant to your audience by using words and images that reflect their life situations*
10. *Ensure legibility by using 12 point or larger, sans serif fonts, and contrasting dark text on lighter backgrounds*

## Your Outreach Action Plan

Follow these four steps to create an action plan that will help you reach out to people with a mental illness who have Medicare:

**Step 1:** Reaffirm your commitment to meeting the needs of every person with Medicare benefits while recognizing that extra outreach is often necessary to reach those who have a mental illness. Communicate the vision of outreach throughout your organization.

**Step 2:** Ensure that all mental health partners in your network expansion efforts are aware of your SHIP, know to refer people with a mental illness who have Medicare to your SHIP, and have the appropriate contact information at their fingertips. As you identify partners, consider how people with mental illness access services in your community. Communicating with mental health partners may be accomplished in face-to-face meetings, teleconferences, e-mail communications, distribution lists, or by other means, depending on the needs and capabilities of the SHIP and your specific partners.



**Step 3:** Based on your network expansion activities, make a list of other providers (pharmacies, physicians' offices, hospital emergency rooms and urgent care centers, social service agencies, etc.) who are in contact with people with Medicare in the places where they most often experience difficulty. Determine what type of outreach materials could be provided to them. The CMS publications group is an excellent source of materials.

**Step 4:** Contact the additional providers on the list you created in Step 3 and deliver outreach materials (existing materials or newly created ones) along with a personal greeting and explanation of the SHIP program. Ask them to distribute the materials as needed to their customers/patients/clients.

**Step 5:** Evaluate whether your outreach activities are effective. Continually improve your processes by pairing lessons learned with your goals for future outreach efforts.

## Summary

Now, reconsider the scenarios presented at the beginning of the chapter:

- ❖ A woman taking several medications for the treatment of a mental illness enters her usual pharmacy to pick up her prescriptions. She:
  - Is not aware that she has been automatically enrolled in a Medicare prescription drug plan
  - Is charged the full price for her prescriptions
  - Does not have the funds available to purchase her drugs
  - Is surprised and panicked by the news

The pharmacist provides her with contact information provided by your SHIP, and tells her that your organization can help. She follows up with a SHIP counselor, who identifies the woman's Medicare prescription drug plan and ensures that she is receiving extra help. The counselor explains the woman's new Medicare prescription drug benefits to her. She returns to the pharmacy and receives her prescriptions.

- ❖ A disabled person reaches out to his case worker at a mental health clinic for help in determining whether his Medicare prescription drug plan is meeting his needs.

The case worker now has access to your SHIP contact information, so he can reach out to a local SHIP counselor, who sets up a meeting time for the three parties to discuss the disabled person's Medicare prescription drug plan options. They help him choose the plan that best suits his needs.



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This chapter provides guidelines to help SHIP organizations consider how people with mental illness who have Medicare would benefit from additional outreach. It provides an overview of specific groups who may benefit from enhanced outreach and identifies the goals of the outreach guidelines provided here. Finally, it provides an action plan for using existing outreach materials, creating new materials, and delivering them to the appropriate audience, using the networks you have built. Following this action plan will position your SHIP to successfully reach people with a mental illness who have Medicare benefits.