

## Summary of the Medicare Beneficiary Ombudsman's Open Door Forum – February 15, 2006

On Wednesday, February 15, 2006, Daniel J. Schreiner, the Medicare Beneficiary Ombudsman, conducted the first Ombudsman's Open Door Forum (ODF).

In support of his role as the "Voice for Beneficiaries" within CMS, Mr. Schreiner is directly engaging with Medicare beneficiaries and advocacy groups to identify opportunities for improving the Medicare beneficiary experience. Open Door Forums allow Mr. Schreiner to interact with a broad group of participants at the national level. These forums are supplemented by roundtable meetings with small groups of beneficiaries and partners in communities around the country.

Over four hundred people participated in the first Open Door Forum. Participants included beneficiaries, Advocacy Groups, pharmacies, prescription drug plans, employers and Federal and state agencies across the United States. Mr. Schreiner used the first ODF to introduce the Office of the Medicare Ombudsman (OMO) and provide an update on the Medicare prescription drug benefit. Highlights of the ODF are summarized below.

### Participant Feedback and Questions

Beneficiaries and advocates in attendance raised a number of questions and/or issues regarding the Medicare prescription drug benefit and asked questions about the role of the Medicare Ombudsman. Some of the questions/issues were specific to an individual. Others had a potentially broader impact such as:

- Potential disenrollment issues,
- CMS communications to plans regarding the purpose of the transition plan extension,
- Plan requirements for notifying beneficiaries of formulary changes,
- Turnaround time for follow-up on cases referred through 1-800-MEDICARE,
- CMS process for managing plan compliance,
- Passive enrollment of beneficiaries with traditional Medicare, and
- Plan requirements for appeal and grievance processes and the provision of written responses.

Mr. Schreiner and the SMEs addressed questions and/or directed participants to the appropriate CMS resource. For individual cases, Mr. Schreiner encouraged callers to work through the existing CMS casework process and to ask that his office be alerted when the existing process does not work. Mr. Schreiner will coordinate with the appropriate entities within CMS on systemic issues and if appropriate will follow up on the agency's progress via future Open Door Forums and the Ombudsman website.

Questions raised on appeals and exceptions will be addressed in the March 28 Open Door Forum.

### Medicare Beneficiary Ombudsman's Open Door Forums

The Ombudsman Open Door Forum is intended to encourage dialogue between CMS, beneficiaries, and partners on the barriers they experience when accessing services. This initial ODF deviated somewhat from this format because it was necessary to introduce the Ombudsman role and function. It was also important to use this first forum as an opportunity to address questions regarding the Medicare prescription drug benefit.

Future ODF sessions will focus on one or two specific topics, at the Ombudsman's discretion, based on issues that advocacy groups and others bring to his attention. One topic will be broad in focus and the second narrow (e.g., specific to a certain beneficiary population). ODF participants were encouraged to recommend topics for future ODFs and/or provide feedback regarding this ODF.

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## Introduction to the Office of the Medicare Ombudsman

In introducing his role and responsibilities, Mr. Schreiner discussed the role of the Office of the Medicare Ombudsman and how it plans to work for beneficiaries and advocates to improve beneficiaries' Medicare service experience.

In 2006, the OMO seeks to address improvement opportunities in four key areas: Medicare Beneficiary Education, Rights and Protection, Appeals, and Case Work. For each of the four areas, the Ombudsman will:

- Determine the processes, resources, and performance measures currently in place;
- Seek input on beneficiaries' awareness, understanding and experience with those processes; and,
- Identify gaps the OMO can address.

To accomplish this, the OMO will:

- Capture the "voice of the beneficiary" through open door forums and regional meetings;
- Implement a performance measurement system to identify systemic issues in the beneficiary service experience; and,
- Make recommendations for overall program improvement based on analysis of trends and information from Medicare beneficiaries and advocates.

## Medicare Prescription Drug Benefit Update

CMS subject matter experts (SMEs) within the Center for Beneficiary Choices provided updates on key areas of the Medicare prescription drug benefit including plan assignment/changing plans, formulary coverage, CMS coordination with plans, and CMS casework. The SMEs focused on the processes and controls that CMS has put in place to ensure that every beneficiary leaves the pharmacy with their prescription in hand. The SMEs also outlined the resources available to beneficiaries if they experience problems accessing their benefits.

Beneficiaries and their caregivers were encouraged to use 1-800-MEDICARE to escalate issues for resolution and/or to get answers to any questions that they may have regarding the new program. To facilitate the resolution of reported issues, the SMEs outlined the important information that beneficiaries should provide including their name, plan name, issue, etc.

Mr. Schreiner closed the discussion with a summary of CMS' progress to date highlighting the fact that the Medicare prescription drug benefit represents the largest change in Medicare in over 40 years. Mr. Schreiner acknowledged that CMS has faced challenges, which they have worked to quickly identify and address. As of mid-January, CMS is on track with enrollment targets. Mr. Schreiner encouraged CMS partners to continue to contribute to this progress by bringing issues to CMS' attention.

## Next Medicare Beneficiary Ombudsman's Open Door Forum

Date: Tuesday, March 28, 2006

Time: 2:00p.m.-3:30p.m.

Notifications of future Medicare Beneficiary Ombudsman's ODFs will be communicated via the Ombudsman's mailing list. Visit <http://www.cms.hhs.gov/apps/maillinglists/default.asp?audience=4> and follow the instructions to subscribe to the Open Door Forum mailing list titled - BENEOMBUDODF-L.

If you would like to recommend topic(s) for future ODFs and/or provide feedback on an ODF, please select [Medicare Beneficiary Ombudsman Open Door Forums](#) available at <http://www.cms.hhs.gov/center/ombudsman.asp>.