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**COMPLETE**

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**Q1: Has the program been in existence for at least one year (since September 1, 2013)?** Yes

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**Q2: Staff person submitting this nomination.**

Name: Angela Berns  
Title: Program Manager, Volunteer Services  
Hospital/System: UnityPoint Health – St. Luke’s Hospital – Cedar Rapids, IA  
Address: 1026 – A Ave NE  
City: Cedar Rapids  
State: IA  
ZIP Code: 52402  
Email Address: angela.berns@unitypoint.org  
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**Q3: Name of Volunteer Program you are nominating.** SHIIP (Senior Health Insurance Information Program) at UnityPoint Health – St. Luke’s – Cedar Rapids

**Q4: Program Category: Select one of the four program categories.** Community Outreach and/or Collaboration – programs that designed and implemented an innovative approach with external partners to address needs or challenges within the health care organization or the community.

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**Q5: Provide a brief description of the program, including its goals and outcomes. (600 words max)**

The purpose of SHIIP (Senior Health Insurance Information Program) is to provide free, unbiased counseling to Medicare beneficiaries and caregivers about Medicare, Medicare Prescription Drug Plans (Part D), Medicare Advantage Plans (Part C), Medicare supplement plans, billing and claims issues, Medicare fraud and abuse and long-term care insurance. This service is provided by highly trained volunteers whose goal is to serve Medicare beneficiaries by assisting them to make insurance decision making easier, provide information to compare Medicare and insurance plans, assist with enrolling in Medicare prescription drug plans and assistance programs, and understanding the bills they receive for their health care. These counselors are not affiliated with any insurance, financial planning or pharmaceutical industries.

This program is a community collaboration involving UnityPoint Health – St. Luke’s Hospital, local nursing homes and assisted living communities, the State of Iowa Insurance Division and CMS (The Centers for Medicare & Medicaid Services). The State of Iowa started SHIIP in 1990 in response to the statewide need for senior health insurance information and St. Luke’s Hospital was one of the first local community sponsor sites. In December 2015, our program will be in existence for 25 years and have served thousands of individuals. SHIIP volunteers provide free informational materials and community presentations such as “Welcome to Medicare”, as well as one-to-one assistance in a confidential setting with Medicare coverage, Medicare supplement insurance, long-term care insurance, Medicare and insurance claims and other related issues. SHIIP volunteers do not recommend insurance companies, plans or agents. The volunteers, trained by the State of Iowa Insurance Division, answer questions and provide impartial information to help seniors make well-informed decisions.

SHIIP counselors help to answer questions such as:

- I'm retiring. What kind of health insurance do I need?
- I can't make sense of my Medicare statements and medical bills. What do I do next?
- I've been considering long term care insurance, but is it a good option for me?
- Do I need a Medicare supplement policy?
- How can I help my parents with health insurance?
- There's an error on my bill and I don't know what to do.

The SHIIP Office at St. Luke’s consists of a Sponsor Coordinator who is the Manager of Volunteer Services; the Volunteer Services Department Secretary lends day to day support to volunteers as needed, eight reception desk volunteers, five Data Entry Volunteers, four Office Support Volunteers and 14 Volunteer Counselors. All volunteers must complete assignment-specific training. Counselors undergo an intensive six day initial training and assignment shadowing on Medicare and Medicare programs to enable them to provide quality service to our clients. In addition to the initial training, counselors receive quarterly training throughout the year to stay up-to-date on important Medicare events, changes in programs, Medicare website updates and any additional issues that affect service to Medicare beneficiaries. Sponsor Coordinators remain in close contact with the state office each year to discuss important program changes, volunteer recruitment and management, and ways to improve their programs.

In 2005 the Medicare Modernization Act was signed and in 2006 Medicare beneficiaries were offered the opportunity to change their drug prescription plans. Medicare Part D Open Enrollment occurs yearly from October 15 – December 7. At this time, our office is in high gear running appointments with three counselors between the hours of 8 am – 5 pm, Monday – Friday so that beneficiaries can enroll in new plans that make managing their health and new diagnoses financially easier. In 2013 our volunteer team saved 2,577 individuals almost half a million dollars on prescription drugs.

**Q6: Describe the role of volunteers in planning, developing, implementing and maintaining the program. (400 words max)**

Choosing Medicare and related health care coverage can be challenging. This free, confidential service provides people on Medicare and concerned relatives or friends with objective information about their health insurance needs. Volunteers help develop and implement a local plan for promotion and recruit new volunteers into the program. Expectations of the volunteers are high. Most are retired and/or a senior themselves so they can relate to client questions. Many times people don't realize the assistance that is available in their local communities. Volunteers are essential in getting the word out through community presentations and health fairs. This year volunteers have/or will be participating in over 25 such events. In the seven – eight weeks of Open Enrollment our volunteers will see more than half of our client base for individual appointments. Last year the number of people assisted during Open Enrollment was 1,498. As the largest sponsor site Iowa, volunteers have created processes to move the maximum number of people through in a very short period of time. In 2011 we created a volunteer taskforce to plan, develop, implement, and maintain process change for the SHIIP Office. Taskforce members include volunteers from each of the four assignments related to the SHIIP Office. Every year the operation of the SHIIP Office, in particular, the period of Open Enrollment, becomes smoother and easier for the volunteers to manage the increasing number of clients seen and presentations completed because of volunteer suggestion and action to follow through and implement suggestions.

For example, last year our office was able to eliminate paper schedules and move scheduling to an on-line system that was developed with the suggestions of volunteers, is managed by a volunteer, and used daily by all of the volunteers. This scheduling system houses information that allows volunteers to access their client calendar from home to see what client appointments they will have during their shift. It also allows volunteers to call and reschedule clients from home as their own availability changes and this then makes that office time available for another counselor to use. Because we are the largest sponsor site in the state, Volunteers have also created a process for doing much of the data entry required for a Part D appointment on the front end before the client appointment. This allows the counselor to focus on counseling and not data entry, thereby enabling them to see more clients per shift.

**Q7: Describe how this program is unique and/or innovative.(400 words max)**

This program is unique and innovative not only because volunteers are providing this level of counseling to a wide variety of socioeconomic groups, but because of the collaboration of UnityPoint Health – St. Luke's, local nursing homes and assisted living community residents, the State of Iowa Insurance Division and CMS. Medicare and other types of health insurance can be incredibly confusing and the St. Luke's SHIIP Office provides counseling Monday through Friday, 8 AM – 5 PM, except when the office is closed for holidays. SHIIP counselors provide accurate, objective information; they help clients understand their options, so that they can make better-informed decisions and relieve stress. All SHIIP presentations and counseling sessions are free. There is no financial benefit to any of the partners. For St. Luke's Hospital; we are able to refer our patients to a valuable, informative, in-house resource regarding their health coverage.

Clients have come in with boxes of bills that they have not been able to face and SHIIP Counselors help them make sense of all of that paperwork. Because of changing health conditions through the year and an increase of medication expenses, some clients don't know how they will be able to afford both groceries and medications. Counselors help them do both. Clients who have lost a spouse and are overwhelmed with grief are assisted with turning in claims and receiving reimbursements. One counselor recovered one client over \$10,000 in overpayments.

Volunteers who commit to this program, stay with it, often holding weekly office hours and establishing relationships of trust and respect with their clients. One volunteer has been with our program for 22 years and two individuals are on the waiting list for the 2015 training. These volunteers have a passion for this particular volunteer assignment unlike anything I have ever seen. The level of training and continuing education they must commit to is astounding as is their desire to serve as many people in need as they possibly can.

**Q8: Describe how the program benefits the service recipients, the health care organization and/or the community. (400 words max)**

SHIP is a national program and also a well-kept secret. Many people do not know that it exists. Every week people find out about the services we provide at St. Luke's Hospital and wish they knew about us sooner. Volunteers, St. Luke's and the State of Iowa Insurance Division are committed to growing this program and reaching as many people as possible. In collaboration with our state office, mailings are sent to those turning 65 on a quarterly basis inviting them to attend a Welcome to Medicare Seminar to learn more. These presentations continuously score a four on a scale of one to four for the value of information presented. SHIP services are offered to hospital retirees. We have been serving the residents of a large retirement community for years with one counselor donating an extra shift to be available at that location on a weekly basis. Two years ago we branched out serving the residents of a local nursing home with three separate locations. A counselor is on call to answer questions these residents have. This year we presented to, and are now seeing, clients at two low-income residential facilities for those on Medicare. Another counselor has added this responsibility to his weekly shifts. Not only do we have open office hours and see people by appointment, but we go to the clients that can't come to us.

Quantitative benefits to the recipients, St. Luke's Hospital, and our community have only begun to be collected. Although we do not have exact numbers, we know that our location has served thousands of people and saved them millions of dollars over the last 25 years. Our benefits can be told through stories of grateful clients, the urge for clients to become volunteers, and the unblinking support from hospital administration. One grateful client set up a trust through St. Luke's to assist employees of the Cedar Rapids Community School District receive up to \$500 per year per recipient at the time of retirement for items not covered by insurance or other third-party payer. Last year over \$17,000 was paid out.

We are answering a critical need. A need most don't even know exists. Medicare beneficiaries, older Iowans and people with disabilities, have local, free, confidential, educated access to Medicare information and counseling. This program consistently demonstrates substantial benefit to everyone involved with it and can be duplicated in any hospital.

**PAGE 6: Contacts**

**Q9: Chief Executive Officer of the nominated hospital/system.**

Name	Ted Townsend
Title	President & CEO
Email Address	Ted.Townsend@unitypoint.org
Telephone Number	319-369-7203

**Q10: CEO Support.**

Checked box confirms that your CEO supports the submission of the nominated program.

**Q11: Administrative Assistant to the CEO.**

Name	Mary Trumpold
Title	Executive Assistant, Administration
Email Address	Mary.Trumpold@unitypoint.org
Telephone Number	319-369-7203

**Q12: Name of the volunteer or auxilian who will be representing the program at the AHA Annual Meeting, May 4, 2015.**

Name	John McDonough
Title	Lead Volunteer
Home Address	4418 Ozark St NE,
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ZIP Code	52402
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**Q13: Volunteer Service Professional/Manager.**

Name	Angela Berns
Title	Program Manager, Volunteer Services
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Telephone	319-369-7044

**Q14: In submitting this application, we give the American Hospital Association permission to use and disseminate the information herein.**

Agree