Chapter 5: Group Outreach and Education and Media Outreach and Education Forms

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Introduction

This chapter provides step-by-step instructions for entering Group Outreach and Education (GOE) activities on the GOE Form and entering Media Outreach and Education (MOE) activities on the MOE Form. The GOE form and the MOE form contain nearly identical data entry fields, with the exception of the *Type of Event* (GOE) vs. the *Type of Media* (MOE), the *Number of Attendees* (GOE) vs. the *Estimated Number of People Reached* (MOE), and *Geographic Coverage* (MOE only). Detailed definitions and guidance are provided throughout this chapter and in a comprehensive [ACL Definitions](#) section at the end of the chapter.

Group Outreach and Education Definition

A Group Outreach and Education (GOE) activity includes any of the following:

- **Interactive presentation to the public either in-person or via electronic means:** Select this option for public education events, including presentations, forums, speaking engagements, or seminars during which substantive knowledge on Medicare or the SHIP program is transferred by oral and visual means from a SHIP presenter to those individuals attending the presentation. "Interactive" means that there is an opportunity for attendees to ask questions of the presenter.

- o Note: Counselor trainings are not considered Group Outreach and Education and should not be entered as interactive presentations.

- **Booth/exhibit at a fair, conference, or other public event:** Includes events where general or program-specific information, and/or printed fact sheets are shared with or distributed to the public. The purpose of SHIP program participation in such events is to inform the public about the availability of SHIP services in their area. For example, some SHIPs attend health or senior fairs or set up information booths in shopping centers to increase that community's awareness of their services and of the need for individual counseling. Some events may be virtual, using technologies to bring people together.

- **Enrollment event:** This includes any type of program where enrollment is the key objective and where team members are on hand to help the beneficiary submit an application online or by paper. An enrollment event may be either solely sponsored by a SHIP or sponsored in partnership with another organization such as Social Security Administration (SSA) office.

Media Outreach and Education Definition

A Media Outreach and Education (MOE) activity is one where general program or Medicare information is shared through a type of media and may include:

- **Billboard.** Select this option to report both paper and electronic billboard advertisements.

- **Email.** Select this option to report an email blast or listserv message to a larger group. Do not include email communications with individual beneficiaries.

- **Magazine**. Select this option to report a magazine advertisement, feature, or story highlighting Medicare or SHIP.

- **Newsletter.** Select this option to report distribution of a local, regional or state newsletter.

- **Newspaper.** Select this option to report a newspaper advertisement, feature, or story highlighting Medicare or SHIP.

- **Radio.** Select this option to report a public service announcement or a live or taped radio appearance including Medicare or SHIP information.

- **Social Media**. Select this option to report use of any social media electronic platform to facilitate Medicare or SHIP information sharing.

- **Television.** Select this option to report a public service announcement or a live or taped radio appearance for the purpose of sharing Medicare or SHIP information.

- **Website.** Select this option to report messaging shared through the state, regional, or local SHIP website for the purpose of sharing Medicare or SHIP information.

- **Other.** Select this option to report other media not listed above. Common examples may include direct mail, distributing flyers or brochures to partner locations like libraries of local provider offices, public transit ads, or public service announcements.

Data Entry Steps and Guidance

When entering data in STARS, you should move through the form by using the Tab key on your keyboard or by clicking through the fields using your mouse. Currently, when an entry is required before saving, STARS identifies the field with a small red R (R). In a future enhancement – date TBD -- the required symbol will be a red asterisk (*).

Tracking Inbox Menu

Upon login, look for *Tracking Inbox* in the main menu.

1. Click on the *Tracking Inbox* menu.

2. Hover your mouse over *Group Outreach And Education* to access a new GOE form, and hover over *Media Outreach And Education* to access a new MOE form. When you hover over the name of a form, it turns red, like *Group Outreach And Education* in the example to the right.

3. When hovering, the option to open a new form appears to the right, like in the example below. Click on "New" option to open a blank form.

✓ **Tip:** If you click on *Group Outreach And Education* or *Media Outreach And Education* in Step #2 above instead of hovering over the form name with your mouse, you will land on a Tracking Inbox specific to that form. From there, click the "+New" button to open a new form.
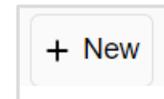
MIPPA

The first decision you must make is whether this outreach and education activity is also related to your work related to the Medicare Improvements for Patients and Providers Act (MIPPA). Click "Yes" if the GOE activity is MIPPA-related.

- **Note:** As explained in the introduction to this manual, STARS is also the MIPPA data reporting system. If you work with the MIPPA (Medicare Improvements for Patients and Providers Act) program, review the MIPPA qualifying *Topics Discussed* in the [Definitions](#) area of this chapter.

Send to SMP

Next, you must answer whether this outreach and education activity is related to Senior Medicare Patrol (SMP) work by a co-trained SMP team member. The STARS default answer to this field is "No." Answer "Yes" to the *Send to SMP* field, if applicable. (Review the introduction to this manual for more details about the SMP program and STARS.)

Send to SMP	○ Yes ● No
SIRS eFile ID	75784

SIRS eFile ID

STARS will autofill the *SIRS eFile ID* of the logged in user, if that team member has a SIRS eFile ID entered on their STARS Team Member Form. Above is an example with an auto-filled SIRS eFile ID of 75784. If you are entering an outreach and education effort conducted by another SMP team member, you should enter <u>that</u> team member's valid SIRS eFile ID in the space provided.

✓ **Missing SIRS eFile ID?** SIRS eFile IDs are generated with the SMP data reporting system, SIRS. If your SIRS eFile ID is inaccurate or missing, or if you do not know the SIRS eFile ID for the SMP team member whose contact you are entering, contact your supervisor.

   o **Note:** If *Send to SMP* is set to "Yes" and no SIRS eFile ID was entered, the following validation error will appear: "Send to SMP Error. Please enter a SIRS eFile ID in order to send this record to SIRS."

Reference Numbers

STARS will assign a *SHIP reference Number* and, if appropriate, a *SIRS Reference Number* <u>after you have saved</u> the GOE or MOE form. During initial data entry, these fields will be blank, as shown.

SIRS Reference Number
SHIP Reference Number

✓ **Tip:** On saved GOE forms, the *SHIP Reference Number* will be known as the SHIP Case Number on the Tracking Inbox and in the Advanced Search tool.

Session Conducted By

This field defaults to you, the logged in user.

Session Conducted By	Edward Sims ▼ Ⓡ

If you are entering work conducted by another team member, use the drop-down list to select the appropriate team member, such as Li Min in this example.

Edward Sims ▼
Edward Sims
Ida Nygaard
James Madison
Kiko Brown
Li Min

✓ There is a data entry shortcut you can try if you are entering a session conducted by someone else and have a long list of names to scroll through. You can click inside the field and start typing the desired name. When the desired name appears, stop typing.

- ✓ The list of team members visible to you will depend upon your place in the STARs hierarchy. You will be able to see the names of team member at and below your level of your program's hierarchy.

- ✓ See the team member chapter and the STARS user roles overview document for more details about data visibility in STARS.

- ✓ This field attaches the GOE or MOE effort to the team member who conducted the work. It is important for data accuracy, particularly for the reports in STARS, and, if applicable, the data sent to the SMP data reporting system, SIRS.

- ✓ When a GOE or MOE effort involves multiple team members, the additional team members are entered on the *Additional Team Members* form after the GOE or MOE form is saved. Instructions for completing the *Additional Team Members* form are provided later in this chapter.

Partner Organization Affiliation

This field is blank during initial data entry. It is not a data entry field the form. Upon saving, this field will be automatically populated with the partner organization affiliated with the team member selected for *Session Conducted By* (Edward Sims, in this example).

Session Conducted By	Edward Sims ▾ ⓡ
Partner Organization Affiliation	*Remains blank until the form is saved.*

Time Spent

Time spent must include <u>all</u> of the following:

- ✓ Time spent preparing for the event (creating, practicing, or updating presentations; copying materials; organizing; etc.)

- ✓ Time spent travelling to and from the event

- ✓ Time spent attending the event.

- ✓ Note: This important field, along with the *Session Conducted By* field, populates the Resource Report.

> **Time Spent and SMP (SIRS)**
>
> Though STARS sends data to SIRS, the time spent cannot be divided between the SHIP and SMP content of the group outreach and education. <u>Enter the entire time spent</u> in a given group outreach and education effort into STARS. ACL accepts that the entire time spent on an interaction will be counted in both STARS and SIRS.

Time Spent in Hours vs. Time Spent in Minutes

Time spent can be entered in hours and/or minutes. Your entries in each field must be whole numbers. The time spent entered in the hours and/or minutes fields automatically calculates into *Total Time Spent (minutes)* field.

Time Spent in Hours

Time Spent in Minutes

Total Time Spent (minutes)   (R)

In the example that follows, the outreach and education effort was 1 ½ hours. The number 1 was entered for *Time Spent in Hours*, and the number 30 was entered for *Time Spent in Minutes.* STARS calculated the time spent as 90 minutes. It would have been equally accurate to leave the *Time Spent in Hours* field blank and enter all of the time in minutes.

Time Spent in Hours	1	Enter Time Spent in Hours OR Minutes. Example: 1.5 hours Time Spent would be entered as either 1 Hour and 30 Minutes OR 0 Hour and 90 Minutes.
Time Spent in Minutes	30	
Total Time Spent (minutes)	90 (R)	

An online prompt to the right of the Time Spent fields explains how to use the time spent fields: "Enter Time Spent in Hours OR Minutes. Example: 1.5 hours Time Spent would be entered as either 1 Hour and 30 Minutes or 0 Hour and 90 Minutes."

180 Minute Prompt

Outreach and education efforts may last several hours, particularly if they involve an exhibit or booth at a conference or health fair or a TV broadcast requiring preparation time, travel time, and studio time. Because of that, you may frequently encounter the STARS prompt for any entry greater than 180 minutes that reads, "Your time spent in sessions is greater than 180 minutes; please check your entry to ensure accuracy. This message will not prevent you from submitting." In the example below, the outreach and education effort was legitimately 5 ½ hours (330 total minutes), generating the time spent prompt.

Time Spent in Hours	5	Enter Time Spent in Hours OR Minutes. Example: 1.5 hours Time Spent would be entered as either 1 Hour and 30 Minutes OR 0 Hour and 90 Minutes.
Time Spent in Minutes	30	
Total Time Spent (minutes)	330 (R)	Your time spent in sessions is greater than 180 minutes; please check your entry to ensure accuracy. This message will not prevent you from submitting.

Title of Interaction

Enter the name of your outreach and education effort in the *Title of Interaction* text field.

Title of Interaction   (R)

✓ Tip: Some programs are choosing to include the name of the event venue within the title because there is no field on the form dedicated to the venue. For example, they might enter "Welcome to Medicare – ABC Senior Center." Another option would be to designate a Special Use Field for the name of the event venue.

"Type" Fields

It is the *Type of Event* and *Type of Media* fields that clearly differentiate the *Group Outreach And Education* (GOE) form from the *Media Outreach And Education* (MOE) form. The GOE form uses the term *Type of Event*, with a drop-down list of specific group events. The MOE forms uses the term *Type of Media*, with a drop-down list of specific media efforts.

Type of Event (GOE Form)

This field is a drop-down list, with three types of *Group Outreach And Education* (GOE) event options. A single GOE form can track only one type. If the event included more than one type from the list, enter a separate GOE form for the additional type. For example, if you had an exhibit at a health fair and also gave a presentation, complete one GOE form for the exhibit and complete another GOE form for the presentation.

See the GOE definitions at the beginning of this chapter or in the ACL Definitions section for a thorough ACL description of each of these three types of events.

Enrollment Events Should Not (and Cannot) be Sent to SMP

Enrollment Events are not considered by ACL to be SMP work, though the individual counseling sessions that are entered on BCFs for that event should be sent to SMP, when applicable. If *Send to SMP* is marked "Yes" on a GOE and "Enrollment Event" is selected for the *Type of Event,* the record will not be sent to SMP and will not be saved to STARS. The following validation error will appear: "Send to SMP Error. An error has occurred while attempting to send your message to SIRS. Enrollment Event cannot be selected as the Type of Event."

When to complete a GOE form and a Beneficiary Contact Form (BCF)

If a SHIP team member assists a beneficiary with enrollment at an enrollment event or provides substantial one-on-one assistance during or after a presentation or exhibit/booth, the following steps are required:

1. That beneficiary should be included in the aggregate count for the "Number of Attendees" for the GOE, and

2. A Beneficiary Contact Form (BCF) should be completed to collect as much information as possible about that one-on-one beneficiary contact.

Type of Media (MOE Form)

This field is a drop-down list, and you can make one selection per MOE form. Here is where you select your *Type of Media,* using the guidance provided in the introduction to this chapter, where each type of Media Outreach and Education is defined.

Billboard
Email
Magazine
Newsletter
Newspaper
Radio
Social Media
Television
Website
Other

If you conducted a multi-pronged media campaign involving several of these types of media, enter a separate MOE form for each type of media. For example, if you posted a video to your website and also on social media, complete a MOE for your website and a new MOE for the social media.

"Number of" Fields

The GOE form collects *Number of Attendees,* and the MOE form collects *Estimated Number of People Reached.*

Number of Attendees (GOE)

For all GOE event types, you must devise a method to track attendance (or participation) and report the number on GOE forms. Acceptable methods of tracking attendance include head counts, tick marks on paper at booth, sign in sheet, etc. vs. the number of folks reported by event organizers.

Number of Attendees [ ] Ⓡ

✓ The number of attendees on forms count towards SHIP Performance Measure #2 – Number of Attendees

Estimated Number of People Reached (MOE)

This is a text field. You must enter the estimated the number of "impressions," which refer to the number of listeners, readers, viewers, flyers distributed, and so on.

Estimated Number of People Reached [ ]

Geographic Coverage (MOE)

Select *Geographic Coverage* from the dropdown list of options provided.

✓ Tip: If more than one zip code is targeted in a local-level media effort, select "County or Counties" instead.

County or Counties
Multi-State
National
Regional
Statewide
Zip Code

Start Date and End Date

Entering a *Start Date of Activity* is required. The *End Date of Activity* is optional, allowing you to enter a date range for multiday events and media campaigns, if desired. Click on the calendar icon to select the date or manually enter the date in the field provided. If you choose the latter method, months and days must be entered using 2-digits (i.e. 01 for January, 01 for the first day, and so on). The *Start Date of Activity* defaults to the date of data entry. Remember to adjust the date to the date of the actual event.

1. Activate the date selector tool by clicking the calendar icon.

2. Use the single-pointed arrow to go backward one month at a time.

   a. If you choose this data entry method, avoid accidentally selecting the double-pointed arrow, which takes you backward one year at a time.
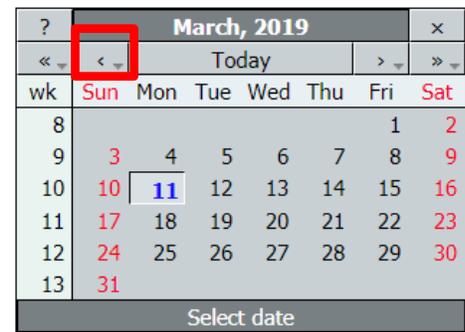
State of Event

The *State of Event* auto-populates, based upon the state of the logged in user. In this example, the *State of Event* was Virginia.

• This field is editable, allowing you to change the state, if needed.

Zip Code and County of Event

The Zip Code and County fields work together in STARS. Enter the 5-digit Zip Code where the event occurred in the *Zip Code of Event* field.

The *County of Event* field will automatically display the county associated with that Zip Code, like Bedford-VA in this example. The *County of Event* field has a drop-down arrow, allowing you to see whether there are multiple counties associated with the Zip Code and to make the correct selection, such as Bedford County or Bedford City County.

Contact Information

None of the Event Contact information is required in STARS. Capturing this information within STARS can help you and your other team members organize and initiate future outreach and education efforts, however. Check with your supervisor to learn whether there are any state or local SHIP program requirements for completing these fields.

Intended Audience

Check all that apply for the *Intended Audience* for your outreach and education effort. Use the scroll bar to see all of the answer options. See the Definitions section of this chapter for ACL guidance regarding *Intended Audience.*

- ✓ Note: In this picture, the only option not pictured is "Other."
- ✓ Tip: You can enter any "Other" intended audiences in a Special Use Field or in Notes. Using a Special Use Field is recommended because it easier to search data entered there. However, for consistent data tracking, you should first check with your supervisor to learn how the Special Use Fields are being designated in your program.

Target Beneficiary Group

Check all that apply for the *Target Beneficiary Group* for your outreach and education effort. Use the scroll bar to see all of the answer options.

- ✓ White/Caucasian is not a target beneficiary group. Select N/A if no target group participated in your event. ("N/A" is the last option; use the scroll bar.)
- ✓ MIPPA-qualifying options are "Low Income" and "Rural."
- ✓ You can enter other intended audiences in a Special Use Field or in Notes.
- ✓ See the Definitions section of this chapter for ACL guidance regarding *Target Beneficiary Group.*

Topics Discussed

This checklist captures details about the information provided in your outreach and education effort. Check all that apply. See the [Definitions](#) section of this chapter for ACL guidance regarding *Topics Discussed.*

✓ MIPPA-qualifying *Topics Discussed* are: Extra Help/LIS, Medicaid, Medicare Savings Programs (MSPs), Preventive Services
✓ All *Topics Discussed* are SMP-qualifying

CMS Duals Demonstration Grants

Some states have Centers for Medicare & Medicaid Services (CMS) Duals Demonstration Grants. Those with the CMS Duals Demonstration Grants will be able to use STARS to report activities for these grants. <u>If you are one of those states, select "Duals Demonstration" at the top of the *Topics Discussed* list for outreach and education efforts related to that grant.</u>

Select any other topics that apply, also. All content on outreach and education forms with "Duals Demonstration" selected may be analyzed by ACL and/or CMS in relation to the Duals Demonstration Grant. If you are unsure about whether your state has this grant, visit: https://acl.gov/programs/strengthening-aging-and-disability-networks/duals-demonstration-ombudsman-program.

Special Use Fields

The Special Use Fields (SUFs) are text fields. Field 3 is nationally designated to capture "covid" as a topic discussed, when applicable. Talk with your supervisor about how else the Special Use fields are used in your program. Keep your entries short and avoid typos to enable

effective searches of entered data. Each program must use these fields consistently to systematically collect and then search, analyze and export the information collected. The field labels are not editable, so using them purposefully will require good internal communication.

Special Use Fields	
Field 1	
Field 2	
Field 3 ⭐	
Field 4	
Field 5	

Tip for Using Special Use Fields (SUFs) ⭐

Your program can determine its own classification for each SUF field, such:

--Field 1 = Other Intended Audience

--Field 2 = Targeted Beneficiary Population (Other)

--Field 3 = Designated by ACL for "covid," when your outreach covers that topic, but you can enter a space and add state or program designated topics, too.

Except for the ACL designated entry, these are meant to be helpful suggestions only.

Notes and Uploaded Files

ACL does not require you to enter notes or upload files into GOE or MOE forms. Talk with your supervisor about whether and how the *Notes* and *Attach File* fields are being used in your SHIP program. The *Notes* field is a text box. Uploading files into STARS works similarly to attaching a file to an email.

- ✓ **Remember**: Your notes and uploaded files are visible to many other team members in your program, so do not enter or upload information that should not be shared.
- ✓ Nearly an unlimited number of characters are allowed in the *Notes* field.
- ✓ The *Attach File* size limit is 500 MB per file and allowed file types are: pdf, png, jpeg, rtf, doc/docx; ppt/pptx; xls/xlxs, m4a, csv, html, xml, bmp.

After entering any notes, if desired, click *Browse* to upload a file from your computer. You might want to upload the event flier or a PowerPoint presentation.

Notes	Enter your notes here.
Attach File	📎 STARS Media Outreach and Education Job Aid (8.2.18).docx
Attach File	[ ] Browse
Attach File	[ ] Browse
Attach File	[ ] Browse
Attach File	[ ] Browse

- ✓ Note: Until you have saved, the file name for your attached file will be preceded by the phrase "\fakepath\," but it will be removed from the saved file, like in the view above.

Save Your Work

Save

When you press the blue *Save* button, your GOE or MOE Form will be successfully saved, unless you are prompted to first complete any unanswered required fields.

Validation errors for all forms

You will not be able to save if you did not complete one or more required fields. A validation error prompt will appear at the top of the screen listing any field or fields you neglected to answer. Below is a comprehensive list of all possible validation error prompts for all required fields on the GOE and MOE forms.

Clicking any of the field names listed below the *Validation errors* heading will link you to the actual data entry field. You must respond before you will be able to successfully save.

GOE	MOE
Tracking Inbox » New Group Outreach and Educati	Tracking Inbox » New Media Outreach and Education
Validation errors • Total Time Spent (minutes) is required. • Title of Interaction is required. • Type of Event is required. • Number of Attendees is required. • Zip Code of Event is required. • County of Event is required. • Intended Audience is required. • Target Beneficiary Group is required. • Topics Discussed is required.	**Validation errors** • Total Time Spent (minutes) is required. • Title of Interaction is required. • Type of Media is required. • Zip Code of Event is required. • County of Event is required. • Intended Audience is required. • Target Beneficiary Group is required. • Topics Discussed is required.

Validation errors for MIPPA forms

Beginning September 3, 2020, new validation rules were implemented in STARS to enhance the accuracy of the MIPPA Performance Measures Report. You will receive an error message and be required to edit your form and resave under the following circumstances:

- If MIPPA "Yes" is selected and no MIPPA-qualifying topics discussed are selected.

- If MIPPA "Yes" is selected and no MIPPA-qualifying target beneficiary group is selected.

- If MIPPA "Yes" is selected but the person entered in the "Session Conducted By" field does not have MIPPA selected on the Program field of their Team Member form.

  o If this is the case, someone with a user role capable of editing team member forms will need to edit the team member record. Alert your supervisor.

- See the appendix for MIPPA-Qualifying topics discussed and target beneficiary groups.
- The MIPPA Performance Measures At-A-Glance reference document in the STARS Resources Kit is also helpful for accurate MIPPA data entry and easy access to the MIPPA-qualifying topics discussed with definitions.

Successful Save Indicators

A confirmation indicating a successfully saved SHIP Group Outreach and Education form or Media Outreach and Education form briefly appears on your screen.
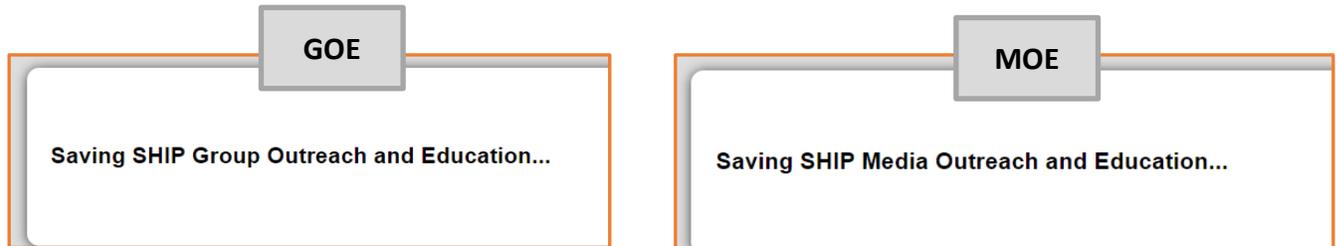
A future STARS enhancement will further emphasize whether you have successfully saved the form. Meanwhile, there are some other indicators that your form successfully saved:

Additional Team Members:

The most obvious indicator of a newly saved outreach and education form is the appearance of the *Additional Team Members* tab. This tab only appears on a successfully saved GOE or MOE form. It allows you to access an *Additional Team Members* form, which is a "child object" to the GOE and MOE forms, meaning it is dependent upon the "parent" GOE or MOE form. This example is from the GOE form, but it applies to the MOE form also.
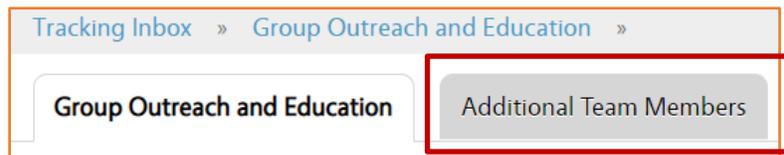
SHIP Reference Number: This field populates upon saving. It is blank on an unsaved form.

Partner Organization Affiliation: This field populates upon saving, based upon the Partner Organization associated with the team member selected for *Session Conducted By.*

Printer Friendly Format: Upon successful saving, STARS provides the option to print your GOE or MOE form in a printer-friendly format. Look to the upper right area of your screen.

🖨 Printer Friendly Format
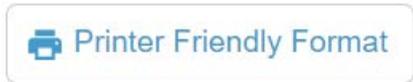
Tracking Inbox: Forms must be successfully saved to appear in your Tracking Inbox. You can review your GOE or MOE Tracking Inbox to be reassured of a successful save. For example, you could look to the Title of Interaction column for an easy-to-remember reference.

	Session Conducted By ↕	Partner Organization Affiliation	SHIP Case Number	Start Date of Activity	County of Event	Zip Code of Event	State of Event	Title of Interaction	Total Time Spent	SIRS Reference Number
▸	Edward Sims	Virginia Site 1020	VA-18-936	08/30/2018	Bedford - VA	24523	Virginia	New to Medicare - Active Seniors Center	200	VA-18-1259-SHIPSMP
▸	Edward Sims	Virginia Site 1020	VA-18-958	09/30/2018	Prince William - VA	20109	Virginia	County Senior Center Welcome to Medicare	150	VA-18-1273-SHIPSMP
▸	Ida Nygaard	Virginia Site 1020	VA-18-961	10/30/2018	Prince William - VA	20109	Virginia	ABC Food Bank Medicare 101	210	VA-18-1276-SHIPSMP

(Toolbar above table: + New « < Page 1 of 1 > » Display 50 per page ↻ Refresh 🖨 Print ⊞ CSV Displaying 1 - 3 of 3 All Assignments ▾ ▼ Filter)

Additional Team Members Form

Enter additional Team Members for the same outreach and education effort using the *Additional Team Members* tab. IMPORTANT: <u>Time spent on the Additional Team Members form populates the Resource Report.</u> The Resource Report is a valuable measurement of a program's level of effort, and the data is reported to Congress.

1. **Hover your mouse over** *Additional Team Members*
2. The *New Additional Team Members* option will appear. **Click on it** to open a new *Additional Team Members* form.

Group Outreach and Education	Additional Team Members
	New Additional Team Members

Step 2: Click "New"

Step 1: Hover your mouse over the "Additional Team Members" tab
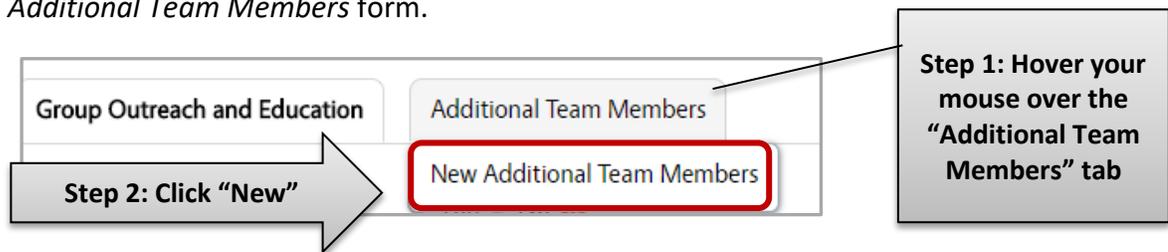
3. On the resulting page, click the "New" button to open a new form.

Group Outreach and Education	**Additional Team Members**

+ New

No records found.
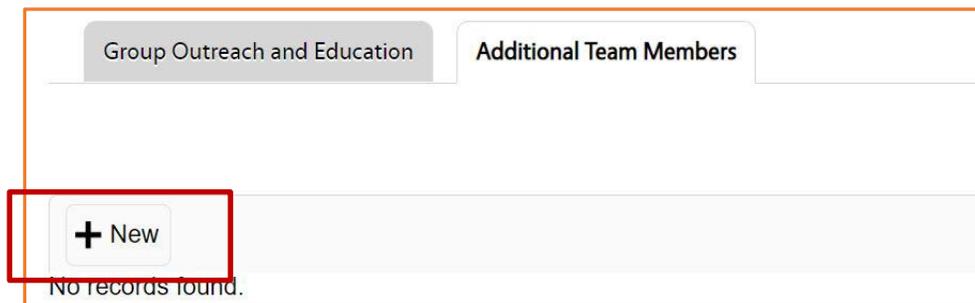
4. Complete this short form to add an additional team member to your GOE or MOE event.

5. Finish by clicking the blue *Save* button.

    a. Each *Additional Team Member* form captures the name and time spent for one team member. Some additional team members may have a lesser or greater amount of time spent than the team member named in the *Session Conducted By* field on the associated "parent" GOE or MOE form. Follow the time spent guidance for each team member's contribution to this event.

6. After completing and saving an *Additional Team Members* form for one additional team member, you will see the screen below, showing the team member you just added.

    a. If you need to continue adding team members to the same "parent" form, click the *+New* button again and repeat the processes until every team member who worked at the event has been entered.

    ✓ **(!) Important note to user of STARS and SIRS (for SMPs):** Additional Team Member details will <u>not</u> transfer from STARS to SIRS. Only the GOE or MOE form (i.e., the "parent" form) will *Send to SMP*. Log into SIRS to add additional team members to that outreach and education event.

Editing Saved GOE and MOE Forms

Already saved outreach and education forms can be opened and the fields can be edited following the instructions provided earlier in this chapter.

1. Go to the Tracking Inbox menu and select the appropriate outreach and education form.

2. The Tracking Inbox for that particular form will open, displaying all of the forms you have entered and any forms entered by others with your name listed in the *Session Conducted By* field, either on the parent form or on any associated *Additional Team Member* forms (i.e. "child objects").

In the example below, the GOE Tracking Inbox is open. The MOE Tracking Inbox has the same appearance, including column headings.

Session Conducted By ⬍	Partner Organization Affiliation	SHIP Case Number	Start Date of Activity	County of Event	Zip Code of Event	State of Event	Title of Interaction	Total Time Spent	SIRS Reference Number
▸ Edward Sims	Virginia Site 1020	VA-18-936	08/30/2018	Bedford - VA	24523	Virginia	New to Medicare - Active Seniors Center	200	VA-18-1259-SHIPSMP
▸ Edward Sims	Virginia Site 1020	VA-18-958	09/30/2018	Prince William - VA	20109	Virginia	County Senior Center Welcome to Medicare	150	VA-18-1273-SHIPSMP
▸ Ida Nygaard	Virginia Site 1020	VA-18-961	10/30/2018	Prince William - VA	20109	Virginia	ABC Food Bank Medicare 101	210	VA-18-1276-SHIPSMP

Tabs: Beneficiary Contact | **Group Outreach and Education** | Media Outreach and Education | SHIP Team Member

Toolbar: + New | « | ‹ | Page 1 of 1 | › | » | Display 50 per page | ↻ Refresh | 🖶 Print | ▦ CSV | Displaying 1 - 3 of 3 | All Assignments ▾ | ⏷ Filter

3. Click the column headings within your Tracking Inbox to sort the entries in ascending or descending order. For example, click the *Session Conducted By* heading to sort alphabetically by name. Date fields will sort by newest or oldest, and so on.

Session Conducted By ⬍	Partner Organization Affiliation	SHIP Case Number	Start Date of Activity
▸ Edward Sims	Virginia Site 1020	VA-18-936	08/30/2018
▸ Edward Sims	Virginia Site 1020	VA-18-958	09/30/2018
▸ Ida Nygaard	Virginia Site 1020	VA-18-961	10/30/2018

4. Click within the row of any entry on the list and that form will open, giving you access to the "parent" form and any associated *Additional Team Member* forms ("child objects").

5. Edit the desired fields and save.

6. Click the *Additional Team Members* tab to access and edit completed forms or add additional team members.

✓ **(!) Important Note to SIRS Users:** Edits to already saved outreach and education forms do not transfer from STARS to SIRS; only the *initial* saved record transfers. If saved data must be corrected or updated later, it must be edited in both systems.

ACL Definitions

⭐ MIPPA Qualifying Outreach

The Medicare Improvements for Patients and Providers Act (MIPPA) tracks outreach and education with a Target Beneficiary Group listed below <u>and</u> one or more of the following Topics Discussed were addressed.

Target Beneficiary Group	Topics Discussed
Low Income	Extra Help/LIS
Rural	Medicaid
	MSP
	Preventive Services

⭐ SMP Qualifying Outreach

All *Topics Discussed* on the outreach and education forms are SMP qualifying *Topics Discussed*; however, "Enrollment Events" on the GOE form are <u>not</u> an SMP qualifying *Type of Event*. The other two options on the GOE form (interactive presentations and exhibits/booth) <u>are</u> SMP qualifying.

Time Spent

Count time spent preparing for the event (creating, practicing, or updating presentations; copying materials; organizing; etc.), travel time (to and from the event), and time spent attending the event. When an outreach and education effort involves multiple team members, enter the full amount of time each team member spent using the "Additional Team Member" tab connected to the saved outreach and education forms.

Type of Event (GOE)

Field	Definition
Booth or Exhibit (Health Fair, Senior Fair, or Community Event)	Select this option when an event includes general or program-specific information, and/or printed fact sheets are shared with or distributed to the public. The purpose of SHIP program participation in such events is to inform the public about the availability of SHIP services in their area. For example, SHIPs may attend health or senior fairs or set up information booths in shopping centers to increase that community's awareness of their services and of the need for individual counseling. Some events may be virtual, using technologies to bring people together.
Enrollment Event	Select this option for any type of program where enrollment is the key objective and where volunteers or staff are on hand to help the beneficiary submit an application online or by paper. An enrollment event may be either solely sponsored by a SHIP or sponsored in partnership with another organization such as Social Security Administration (SSA) office. Reminder: Enrollment Events cannot and should not be sent to SMP.

Interactive Presentation to Public (In-person, Video Conference, Web- based Event, Teleconference)	Select this option for public education events, including presentations, forums, speaking engagements, or seminars during which substantive knowledge on Medicare or the SHIP program is transferred by oral and visual means from a SHIP presenter to those individuals attending the presentation. "**Interactive" means that there is an opportunity for attendees to ask questions of the presenter.** (Note: Counselor trainings are not considered Group Outreach and Education and should not be entered as interactive presentations.)

Type of Media (MOE)

Billboard	Select this option to report both paper and electronic billboard advertisements.
Email	Select this option to report an email blast or listserv message to a larger group. Do not include email communications with individual beneficiaries.
Magazine	Select this option to report a magazine advertisement, feature, or story highlighting Medicare or SHIP.
Newsletter	Select this option to report distribution of a local, regional or state newsletter.
Newspaper	Select this option to report a newspaper advertisement, feature, or story highlighting Medicare or SHIP.
Radio	Select this option to report a public service announcement or a live or taped radio appearance including Medicare or SHIP information.
Social Media	Select this option to report use of any social media electronic platform to facilitate Medicare or SHIP information sharing.
Television	Select this option to report a public service announcement or a live or taped television appearance for the purpose of sharing Medicare or SHIP information.
Website	Select this option to report messaging shared through the state, regional, or local website for the purpose of sharing Medicare or SHIP information.
Other	Select this option to report other media not listed above.

Intended Audience

An intended audience is defined as the group of people/population for which the Group or Media Outreach and Education event or activity was targeted to reach. This may or may not include a targeted/specific group of Medicare Beneficiaries. In the *Intended Audience* sections of the Group Outreach and Education or Media Outreach and Education forms, you may check all of the characteristics that apply to the event/activity's audience.

Field	Definition
Beneficiaries	Check this box if current Medicare beneficiaries are part of the intended audience.
Employer-Related Groups	Check this box if employer-related groups are part of the intended audience (i.e. active or retired employee groups, human resources departments).

Family Members/Caregivers	Check this box if family members or caregivers of current Medicare beneficiaries are part of the intended audience.
Limited-English Proficiency	Check this box if Medicare beneficiaries with Limited English Proficiency are part of the intended audience.
Medicare Pre-Enrollees	Check this box if those nearing Medicare eligibility are part of the intended audience.
Partner Organizations	Check this box if partner organizations are part of the intended audience.
People with Disabilities	Check this box if persons with disabilities either currently enrolled in Medicare or nearing Medicare eligibility are part of the intended audience.
Rural Beneficiaries	Check this box if rural dwelling current Medicare beneficiaries are part of the intended audience.
Other	Check this box to indicate an intended audience other than those listed.

Target Beneficiary Group

In the *Target Beneficiary Group* sections of the Group Outreach and Education or Media Outreach and Education forms, you may check all of the characteristics that apply to the event/activity's audience. Please note for MIPPA, in cases when your target population are rural Medicare beneficiaries, you must ensure "Rural" is selected in the *Target Beneficiary Group* section of the Group Outreach and Education form.

Field	Definition
American Indian or Alaskan Native	Check this box if the outreach event or media product is targeted to reach the American Indian or Alaskan Native population.
Asian	Check this box if the outreach event or media product is targeted to reach the Asian population.
Black or African American	Check this box if the outreach event or media product is targeted to reach the Black or African American population.
Disabled	Check this box if the outreach event or media product is targeted to reach persons with disabilities.
Hispanic/Latino	Check this box if the outreach event or media product is targeted to reach the Hispanic or Latino population.
Non-native English Speaker	Check this box if the outreach event or media product is targeted to reach populations whose primary language is not English.
Low Income	Check this box if the outreach event or media product is targeted to reach the low income population. Notes: • The federal income limit for Medicare beneficiaries to be eligible for Extra Help/Low Income Subsidy is 150% of the federal poverty limit (FPL). • Low income Medicare beneficiaries are a MIPPA target population.
Native Hawaiian or other Pacific Islander	Check this box if the outreach event or media product is targeted to reach the Native Hawaiian or Pacific Islander population.
Rural	Check this box if the event or media product is targeted to reach beneficiaries residing in the states' identified rural counties. Notes (next page):

	• All states and territories do not have designated rural counties. • Directors may check the SHIP or MIPPA Performance Measure report to determine which counties are designated as rural within your state. • Rural Medicare beneficiaries are a MIPPA target population.
N/A	Check this box if the outreach event or media product is for the general population and there is no target group or specific audience.
Other	Check this box if the outreach event or media product is targeted to reach populations that are different from those listed above.

Topics Discussed

Listed below are descriptions for outreach and education topics. Team members should select the boxes for all topics that apply. If, for example, a team member discusses Medicare Advantage and Medicaid, then both boxes should be selected.

Field	Definition
Duals Demonstration	Check this box to indicate providing information about dually enrolled in Medicare and Medicaid beneficiaries which may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, marketing/sales complaints/issues, quality of care, and plan non-renewal.
Extra Help/LIS	Check this box to indicate providing information about the Extra Help/LIS program. This may include eligibility explanation/screening, benefit explanation, claims/billing, appeals/grievances, fraud and abuse, or marketing/sales complaints/issues.
General SHIP Program Information	Check this box to indicate providing general information about the SHIP program.
Long-Term Care Insurance	Check this box to indicate explaining LTC insurance. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, and marketing/sales complaints/issues.
Medicaid	Check this box to indicate discussion of Medicaid coverage. This could include discussion of Medicare cost sharing, long term services and supports (LTSS), home and community-based services (HCBS), long-term care (LTC), etc.
Medicare Advantage	Check this box to indicate discussion of Medicare Advantage coverage. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, and marketing/sales complaints/issues.
Medicare Fraud and Abuse	Check this box to indicate discussion of Medicare Fraud and Abuse.
Medicare Part D	Check this box to indicate discussion of Medicare Part D coverage. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, *(cont. next page)*

	appeals/grievances, fraud and abuse, plan nonrenewals, and marketing/sales complaints/issues.
Medicare Savings Programs (MSPs)	Check this box to indicate discussion of the Medicare Savings Programs (QMB and SLMB). This may include eligibility explanation/screening, benefit explanation, claims/billing, appeals/grievances, and fraud and abuse.
Medigap or Supplemental Insurance	Check this box to indicate discussion of Medigap or Supplemental Insurance coverage. This may include eligibility explanation/screening, benefit explanation, plan comparison, plan enrollment/disenrollment, claims/billing, appeals/grievances, fraud and abuse, and marketing/sales complaints/issues.
Original Medicare (Parts A and B)	Check this box to indicate discussion of Original Medicare Parts A and B coverage. This may include eligibility explanation/screening, benefit explanation, enrollment/disenrollment, claims/billing, appeals/grievances, and fraud and abuse.
Partnership Recruitment	Check this box to indicate targeting new partners.
Preventive Services	Check this box to indicate discussion of Medicare Preventive Services coverage. This may include eligibility, benefit explanation, claims/billing, appeals/grievances, and fraud and abuse.
Volunteer Recruitment	Check this box to indicate targeting new volunteers.
Other	Check this box to indicate a topic discussed not included in the list.