



Rhode Island SHIP Medicare Open Enrollment Guidelines

Medicare Open Enrollment 2021 Annual Election Period (AEP)

Due to the COVID-19 pandemic, the National SHIP Network and the Office of Healthy Aging (OHA) must re-think our approach to serving Rhode Island Medicare beneficiaries while still ensuring safe guidelines are instituted. To achieve this goal, we are following Rhode Island Department of Health (RIDOH) and Centers for Disease Control and Prevention (CDC) recommendations by implementing such practices as physical distancing and proper use of Personal Protective Equipment (PPE). In considering this new approach, OHA must also ensure that RI SHIP staff, SHIP/SMP volunteers, and the Medicare beneficiaries that we serve remain safe.

For these reasons, OHA is requiring that the in-person provision of SHIP counseling services by RI Integrated Partners during the Medicare Open Enrollment 2021 Annual Election Period (October 15 to December 7, 2020) be replaced with remote counseling sessions.

The following procedural guidelines have been developed to assist RI SHIP Counselors, Volunteers, and Medicare beneficiaries stay safe while providing complete, accurate, and unbiased information to Medicare beneficiaries during AEP.

Regional Office Access for RI SHIP Staff (Counselors and Volunteers; otherwise known as “staff”)

If SHIP Regional Points are providing an office space location for staff to perform remote AEP counseling, the following procedures must be followed:

- SHIP staff must be assigned staggered arrival and departure times, to deter from crowding/congregating at building entrances/points of egress and to ensure social distancing.
- All SHIP staff entering the building location must wear a cloth face covering and be screened as described in '[Guidance for Locations Offering OHA Programs](#)'.
- SHIP staff must be assigned an individual workspace that is at least 10 feet from other office staff, with the preference that RI SHIP/SMP Volunteers are placed in separate rooms.
- If staff are reporting to the Integrated Partner office location, they will be provided a workstation, desk computer or laptop, and access to internet/wi-fi while in the building.
- Workstations at the office building location will be sanitized before use so that RI SHIP staff have a clean workspace. After the staff person leaves, the workstation will be sanitized by facility staff.
- Hand sanitizer must also be provided at the location.

OHA encourages regional partners to identify and designate one location (can be a senior center/Integrated Partner sub-contractor location) as the facility at which SHIP staff can report to perform counseling services. This will decrease the number of locations at which heightened screening, disinfection, work-station set-up, etc., needs to be conducted.

Virtual Platforms and Remote Technology Assistance

- Regional Integrated Partners will provide SHIP staff – whether they are reporting to the Integrated Partner location or providing counseling from a remote location – with accounts on a **secure**, web-based meeting platform such as WebEx, Zoom, Google Meet, etc.
- Training on these platforms will be provided by the Regional Integrated Partner Supervisor (or their designee). *Please also refer to **Attachment** – [RI SHIP Remote Medicare Counseling Tools](#)*
- Integrated Partners will provide SHIP staff with a Google Voice phone/messaging number. See how to set up a Google Voice number [here](#).

How to Retrieve Documentation From or Send To Beneficiaries

If the beneficiary has documents that must be reviewed prior, during, or after the appointment, the Integrated Partner staff must retrieve that paperwork by one (1) or both of the following two (2) options:

In-Person Delivery Option:

- Beneficiary will be assigned a date and time to arrive at the Integrated Partner's parking lot and will be told to not exit their vehicle.
- Client will be met in the parking lot by a member of the Integrated Partner staff or their designee. The client will show their photo ID through the window to verify their identity.
- Client will pass document(s) through window to staff. Staff will review documents, and have the client complete a Client Confidentiality Agreement/Release of Information Form in [English](#) or [Spanish](#). Staff will place all documents, including intake form, into a folder previously marked with client's name, address and phone number.
- The client folder will be handled by the staff person so that proper hand washing and/or hand sanitizer is utilized to reduce any viral transmission; the folder should be handled by only one staff person and returned to the office.
- All documents/folders will be kept in a secure and/or locked area when not being actively worked with.

Standard Mail or E-Mail Delivery Option:

- The RI SHIP staff person may need to print a copy of plan information, enrollment confirmation, or any other necessary forms/documents to send the beneficiary via standard mail or email. Regional Points need to establish a preferred best practice for mailing information. The following methods are suggested:
 - If staff are working in the office, all outgoing standard mail from the office location should be sent via normal office procedure.
 - Should a RI SHIP staff person working from their remote location choose standard mail, the documents should be saved as a PDF on the computer and then emailed to the designated staff person who may be assigned to send out standard mail items. Please note if PDF capability is not available, see www.cutepdf.com, a free program that allows creation of a PDF from any printable document.
 - Regional Points can also supply staff that are counseling remotely with envelopes, paper and postage (in advance or via reimbursement) that can be sent directly from the counselor's remote location.

- RI SHIP staff can also ask the beneficiary if they have the ability to receive forms/documentation (such as plan finder information, confirmation of enrollment, etc.) via email. If the beneficiary is comfortable with this method, the documentation must be emailed via a secure e-mail or a password protected PDF. *Please refer to **Attachment** – [Options for Sending Secure Documents](#)*
- **Please do not email any PII (personally identifiable information) or PHI (personal health information) that is not encrypted, or password protected.**

Scheduling Beneficiary Appointments

Assisting beneficiaries with plan comparisons over the phone can be challenging. Individual staff may use different strategies to convey the information to beneficiaries. It may be helpful if the client can follow along on their own computer. If not, the information may be provided verbally, copied and emailed to the client, or printed and mailed.

- The number of clients served and appointments available shall be determined by the number of SHIP staff and volunteers available at each regional location.
- Beneficiaries seeking AEP assistance will be directed to call their Regional location.
- Each Regional location shall be responsible for managing appointments and schedules. Regional Points can utilize programs like [Acuity Scheduling](#) to assist with scheduling client appointments.
- Beneficiaries will receive confirmation of their appointment via a phone call and be given instructions explaining next steps.
 - When calling the client in this instance, and if the call goes to voice mail, the staff person shall leave a message noting the time when the beneficiary will be called back.
- OHA has also developed a *RI SHIP Counseling Sheet* to assist RI SHIP staff in gathering necessary information in preparation of a remote counseling session. ***Please refer to Attachment – [RI SHIP Counseling Sheet](#)***
- Regional Points should have a designated point-of-contact for SHIP staff (that are counseling remotely) who may need additional support or have questions.

Conducting Remote Counseling Appointments

When scheduling appointments at the outset of AEP, RI SHIP recommends a sixty (60) minute time allowance. As AEP progresses, regional locations can adjust this time allowance based on their own experiences and needs (e.g., is more time needed?, is less time needed?, does the beneficiary have a language barrier with the counselor/volunteer?, etc.). To prepare for the remote session, the following steps will need to be considered:

- RI SHIP staff will conduct the AEP appointment via the platform of the beneficiary's choice (phone, Zoom, etc.).
- If the beneficiary has an email account and access to a computer and internet service, the appointment setter or staff person can send, in advance, materials and/or links to websites that will be used during the remote counseling session relevant to the nature of the beneficiary needs.
- If the beneficiary does not have access to those items as noted directly above, then the staff person could mail helpful information (e.g., spreadsheet of local MA/MAPDs) in advance of the scheduled remote counseling appointment, should regional staffing permit.
- RI SHIP recommends, at minimum, that staff preface any number called with ***67**. This action prevents caller ID from identifying their personal number. The caller ID will show "Restricted". The staff person can advise clients in advance if the "Restricted" ID will appear when called.
- An alternative to ***67**, is to set up a dedicated Google Voice phone number for all RI SHIP-related work. Google Voice phone numbers are free and have features like online retrieval of messages, voice mail transcription, etc. For more information go to <https://voice.google.com/u/0/about> or refer to the step-by-step guide provided by OHA: [*Attachment # 1 – RI SHIP Remote Medicare Counseling Tools*](#)
- SHIP counselors will share their computer screen (if applicable) while conducting virtual meetings so that the beneficiary can view the Medicare Plan Finder (MPF) and observe all the steps being taken by the staff person throughout the enrollment process.
- If the beneficiary has computer access, the SHIP staff person can instruct the beneficiary to do the following:
 - Assist beneficiary with setting up a [MyMedicare.gov account](#)
 - Assist beneficiary on how to enter their drugs into the MPF
 - Assist the beneficiary by viewing plans simultaneously and offering plan analysis
 - Assist beneficiary on how to find participating providers on plan websites
- Advise beneficiaries that the staff person will call at the appointed time and to be ready to receive the call. If staff are working remotely, they may not be able to call the beneficiary back if they are using their personal landline or cell phone.

- Staff should be in a quiet, non-distracting location and remind the beneficiary to have their drug list and Medicare number ready, or their [MyMedicare.gov account](https://www.mymedicare.gov) access information, if applicable.
- Depending on the client's needs and their familiarity with how to navigate a computer, the counseling session may require the staff person to seek additional help. RI SHIP advises that each staff person know how to conference call using their cell phone, if it has that capability. The staff person may want to conference call with another regional staff member at their office or at OHA, at SSA, at 1-800-Medicare, etc., to look up the client's record or to collaborate on a process for resolving an issue. Staff should check with their cell carrier on how this process is done, if they are unfamiliar.
- Upon completion of the appointment, the staff person will print and mail confirmation of enrollment to the beneficiary via standard mail. If the client provided other documents (via the process described on page 4) they will be returned via standard mail.

Accommodations for In-Person Counseling Appointments

There may be instances that will require an in-person counseling appointment. Examples of this rare exception would be if the beneficiary has medical and/or cognitive needs that negate remote and/or phone appointments (including, but not limited to, auditory, vision, cognitive impairments).. When this is the case, the Regional Integrated Partner Coordinator must be consulted prior to the scheduling of any in-person appointment to ensure all regional SHIP staff and volunteers are providing AEP beneficiary assistance in a safe, secure and consistent manner. All client and staffing needs will be considered and if an in-person appointment is warranted, the Regional Integrated Partner Coordinator must ensure that proper arrangements are made so that the counseling session can be conducted in a safe and secure manner. Furthermore, if an in-person counseling session is necessary, the Regional Integrated Partner Coordinator must adhere to all Rhode Island Department of Health (RIDOH), Centers for Disease Control and Prevention (CDC) and other state and federal guidelines to ensure the health, safety and welfare of staff, volunteers, and clients. OHA's Integrated Partners should review [Interim COVID-19 Guidance for Community Gathering Facilities Offering the Rhode Island Office of Healthy Aging Programs](#).

OHA will be checking with Integrated Partners on a regular basis to monitor the number and frequency of in-person appointments. **In-person appointments should be the exception and not the rule during AEP**

Physical Setting

- All building entrances must have the developed RIDOH's posters notifying anyone entering the facility of the requirement to wear a facemask. These posters are available on RIDOH's website in [English](#) and in [Spanish](#).
- All individuals entering a regional partner office building or designated location must be wearing a cloth face covering and be screened as described in 'Guidance for Locations Offering OHA Programs' and RIDOH'S posters.
- The physical space used for in-person counseling should be as close to the entrance/exit as possible.
- Only one in-person meeting should take place at one time. The beneficiary must be the only person in attendance, unless they require a caregiver or family support (e.g., due to a medical or cognitive issue, due to a language barrier, etc).
- When scheduling an in-person session, the Integrated Partner should inquire if the beneficiary needs an additional support person while explaining that if support is not needed, they must attend the appointment by themselves.
- Hand sanitizer must be available.
- The beneficiary must be seated at a table that is spaced at least 8 feet from the SHIP counselor/Volunteer, allowing two feet for the moving of chairs while

maintaining a physical distance of six feet. A divider (plastic, glass, etc.) is recommended that will separate the RI SHIP staff person from the beneficiary.

- The counseling location will have a laptop/computer and a second monitor and/or TV screen so that the beneficiary can view the session.
- Materials will be set out for the beneficiary, in advance, to prevent the passing back-and-forth of materials.
- Counseling stations will be sanitized when the beneficiary leaves the appointment.

OHA encourages regional partners to identify and designate one location (can be a senior center/Integrated Partner sub-contractor location) within the region at which in-person appointments are conducted. This will decrease the number of locations at which heightened screening, disinfection, workstation set-up, investments in plexiglass and dual screens/large monitor, etc., needs to be conducted.

Client Confidentiality: Personal Health Information (PHI), Personal Identifying Information (PII) and Other Sensitive Information

The COVID-19 public health emergency has posed multiple challenges to SHIP and SMP programs. Technologies, including virtual platforms to host meetings, trainings, and beneficiary counseling, have become important tools to mitigate program challenges. To be effective virtually, it is important to consider best practices when communicating with colleagues and beneficiaries via email or other virtual modes of communication. Remember that maintaining the confidentiality of beneficiary PHI and PII is the responsibility of all RI Integrated Partner staff.

- When utilizing the OHA developed [RI SHIP Counseling Sheet](#):
 1. Staff must bear in mind the sensitive nature of the information gathered in this questionnaire and take all precautions to keep it safe.
 2. After the counseling session has been completed, the staff person's copy of the questionnaire should be given back to the beneficiary by their preferred method (in person, secure e-mail, or standard mail) to be saved or destroyed.
- RI SHIP Regional Point Partners will not keep any beneficiary's personal information such as: Medicare card, Social Security card, etc.
- Personal information gathered by staff must be destroyed and disposed of properly following an appointment. Any written information of the client's PII (name, Medicare number, contact info, etc.) or PHI (drug list, medical condition(s), etc.) must be shredded or otherwise destroyed after the session concludes.
- Do not send PHI or PII or any sensitive information without ensuring that the email is **secured**.
- Do not share PHI or PII with those not authorized to see it.
- The work-at-home assumption is that a staff person would have a private spot in their remote location to use for counseling appointments to ensure beneficiary confidentiality.
- If the staff person can achieve privacy in their remote location, confidential beneficiary appointments can be conducted safely.
- When sending out **secured** e-mails, it is required that Integrated Partner staff insert a similar notification in the body of the e-mail, such as:
 - *This email and its attachments may contain privileged and confidential information and/or protected health information (PHI) intended solely for the use of authorized individuals as indicated in the e-mail. If you are not the intended recipient, or the employee or agent responsible for delivering this message to the intended recipient, you are notified that any review, dissemination, distribution, printing or copying of this email message and/or any attachments is strictly prohibited. If you have received this transmission in error, please notify the sender immediately and permanently delete this email and any attachments. NOTICE: Private, secure, privileged and identifiable patient health information and personal data that you want to share with us (including patient full name, date of birth, email) can be uploaded using a secure link provided by us upon request. Please never email or attach confidential patient data to an email.*

- RI SHIP staff can also review Privacy and Confidentiality requirements in SHIP TA Medicare Rights University Training at <https://shipta.medicareinteractive.org/course/special-topics/privacy-and-confidentiality> or in the attached PowerPoint. *Please also refer to **Attachment # 4** – [Protecting Client Confidentiality & Privacy PowerPoint Training](#)*

OE Overflow Guidelines:

OHA has established the following guidelines for managing the Regional Points overflow for OE appointments:

1. The Regional Points will continue to schedule virtual/phone OE appointments until they are at full capacity. Please keep in mind this may be different for each region based upon the number of SHIP staff and volunteers available at each regional location.
2. Once the Regional Point has reached full capacity, the Point Regional Director must notify Christine Smith that they have reached capacity and are no longer able to schedule additional appointments.
3. The Regional Point Director will be instructed to move forward and send all Medicare beneficiaries still requesting an appointment to call The POINT (462-4444) to be assisted.
4. In return, Christine Smith will notify Cristina Amedeo and Aura Medina at the POINT of which Regional Point will be now referring Medicare beneficiaries to them so that they are prepared.
5. If the POINT reaches capacity as well, will then both the POINT and Regional POINTS be instructed to refer Medicare beneficiaries to 1-800 Medicare.

Regional Points should not refer beneficiaries to the POINT, unless as a last resort due to OE overflow. This guidance is intended to assist Regional Points, staff and volunteers in efforts to manage OE and provide needed assistance to RI Medicare beneficiaries.



RI SHIP Remote Medicare Counseling Tools

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RI SHIP Remote Medicare Counseling Tools

Overview

This resource is intended for SHIP and SMP project internally use. When working with counselors and beneficiaries this document will ensure you have outlined guidance to send to the beneficiary on “sending” and “receiving” information related to PII electronically. Choosing which platform works for your organization and/or the beneficiary is important. Remember to look at your SHIP’s/SMP’s and/or organization’s current policies and procedures when making these choices to ensure you have the information and resources needed. Finally, keep in mind a few red flags:

- 📁 Encrypted types of documents and/or emails can appear within junk mail folders, remember to check there for items.
- 📁 Be aware of file sizes, receivers can have file size restrictions.
- 📁 If you notice that there are system updates that cause any of this guidance to change on any of these platforms please inform the SMP National Resource Center, info@smpresource.org.

Why Privacy & Confidentiality is Important to SHIP/SMP Work?

1. It allows clients to share personal information that SHIPs and SMPs need to do their work.
2. It shows respect for clients and helps to protect them.
3. It builds the SHIP and SMP program’s reputation as a trusted, reliable resource.
4. It helps to prevent costly privacy and potential security breaches. (VRPM Policy 4.2 and Tips for Privacy and Confidentiality – Online vs. Offline tip sheet for more details.)

Determining Confidentiality

It is important to determine and consider if the information you are sending is confidential. Individual identifiable health information is information that should be sent as protected information, the options in this resource can give you different ways of sending this confidential information electronically.

“Individually identifiable health information” is information, including demographic data, that relates to: an individual’s past, present or future physical or mental health or condition,



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providing health care to the individual, or the past, present, or future payment for providing health care to an individual, and identifies the individual or gives a reasonable basis to use in identifying an individual.

This information may include common identifiers such as:

- A client's name
- Address
- Birth date
- Medicare number
- Social Security number

Information going out to beneficiaries or other team members from a SHIP/SMP that would not need to be protected would include:

- Plan comparisons
- Plan enrollment confirmation
- Brochures on the program, fraud prevention, or identity theft

Related VRPM Policies

4.2 Internet protocol [Required]

Policy: The SMP/SHIP has a protocol for use of the Internet, covering email use and appropriate access to web sites.

The SMP/SHIP has in place a protocol and appropriate training for volunteers who use wireless devices to connect to the Internet while performing SMP/SHIP work.

The SMP/SHIP has a protocol and appropriate training for volunteers who make use of their personal computers while performing SMP/SHIP work.

3.94 Confidentiality [Required]

Policy: Volunteers are responsible for maintaining the confidentiality of all proprietary or privileged information to which they are exposed while serving as a volunteer, whether this information involves a member of staff, a volunteer, a beneficiary or other person, or involves the overall business of the SMP/SHIP.



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Volunteers take all steps necessary to safeguard the confidentiality of all SMP/SHIP and beneficiary related information and to prevent personal information of beneficiaries from falling into the possession unauthorized persons.

Volunteers use any information collected or obtained in their course of their SMP/SHIP work only to assist the beneficiary or otherwise fulfill volunteer role responsibilities. No information collected or obtained in the course of SMP/SHIP work is disclosed other than when clearly approved by an authorized SMP/SHIP representative.

There is zero tolerance for breaches of confidentiality in connection with work at the SMP/SHIP.

ACUITY SCHEDULING

Acuity Scheduling is an incredibly user-friendly appointment scheduling software. It offers robust services for scheduling appointments, classes, workshops, or group events. The software allows quick viewing of your real-time availability and a more straightforward method of booking appointments. One of its functionalities lies in its calendar coordination features.

This link provides easy how-to video resources with topics ranging from how to get started to how to alternate hours and weeks on your custom calendar:

<https://help.acuityscheduling.com/hc/en-us/articles/218724828-Video-Tutorials>

How to Start Using Acuity

Acuity can be set up many different ways to customize your experience. But, to get started, you only need the basics:

- Tell Acuity when you're available for appointments.
- Set up at least one appointment type.
- Send your clients to your scheduling page.

Let Acuity Know Your Availability

- Go to your [Availability](#) settings.
- If you have more than one calendar, click the **Edit Availability/Limits** button for the calendar for which you want to set availability.



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- If there are days of the week that you are always available at the same times — the same hours each Monday, each Tuesday, etc. — you have regular weekly hours. Use the boxes at the top to enter your hours (replacing the default hours that Acuity has automatically entered for you), then click the **Save Regular Hours** button.

Edit Availability: Piano Lesson

REGULAR WEEKLY HOURS (OPTIONAL) Use regular weekly hours if you have similar hours week-to-week, if not, use Override Hours for Specific Days below.

This service group has regular hours every week

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Closed	9:00am-5:00pm	9:00am-5:00pm	9:00am-5:00pm	9:00am-5:00pm	9:00am-5:00pm	Closed

Example: If a client chooses on Friday, based on this availability and your [Calendar Settings](#) clients will see: 9:00am, 9:45am, 10:30am ... 2:15pm, 3:00pm, 3:45pm as times to schedule (unless something else is blocking it).

- If you don't have regular weekly hours, uncheck the box next to **I have regular hours every week**, then click the **Save, switch to Specific Days** button that appears.
- Then click on individual days, enter your hours and click **Set Hours**.

Hours for February 13, 2020 – [Until end date...](#) ✕

9:00am-5:00pm

Thursday



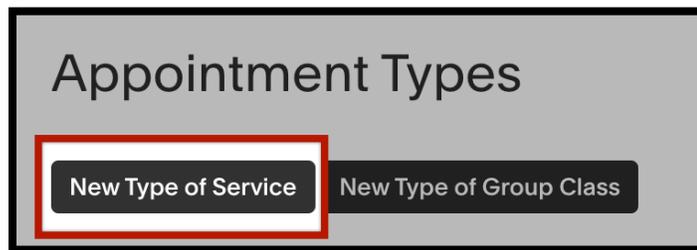
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Set up an Appointment Type

- Navigate to Business Settings > [Appointment Types](#). (On desktop, this will be on the left side of your screen. On mobile, tap the icon with four horizontal lines in the upper left of the screen.)
- Acuity comes with an example appointment type, called Consultation. Click the **Edit** button to the right of the Consultation appointment type.



- Now go through and update the details to fit your needs.
- When you have everything the way you want it, click the **Update Appointment Type** button at the bottom of the page.
- If you need more than one appointment type, use the **New Type of Service** button to create it.



Read More About Appointment Types:

[Create your Appointment Types](#)

[Public & Private Appointment Types](#)

Send your clients to your scheduling page:

- Navigate to Client's Scheduling Page > [Scheduling Page Link](#). (Again, on desktop, this will be on the left side of your screen. On mobile, tap the icon with four horizontal lines in the upper left of the screen.)



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- Copy the link that shows up at the top.

General Scheduling Page

Your Client's Scheduling Page is what your clients use to schedule appointments with you. The general scheduling page shows all public appointment types.

<https://app.acuityscheduling.com/schedule.php?owner=18969485>

Copy Change Link Name

- Send it to your clients.

Using Print to Mail or Fax to Send Confidential Information

When a secure electronic transfer option is not available, the best option is to print the document out and then:

- Use the post office to mail it, or
- If the recipient has a fax machine, you can fax it.

Another option is to use a company that is able to do print to mail. This can be an expensive option; average Midwest cost is around \$2.30 per mailing piece. An example of parameters that can be given by a SHIP/SMP to a print to mail service could include:

- Completed cost comparisons would be emailed to the vendor, average number of pages would be 11 (single-sided).
- Vendor would also be sent a formatted cover letter that provided beneficiary name, address, and key points for the beneficiary to review in their cost comparison.
- Documents would need to be printed, stuffed in an envelope, and mailed first class.
- Mailings needed to be sent/processed at least twice per week.

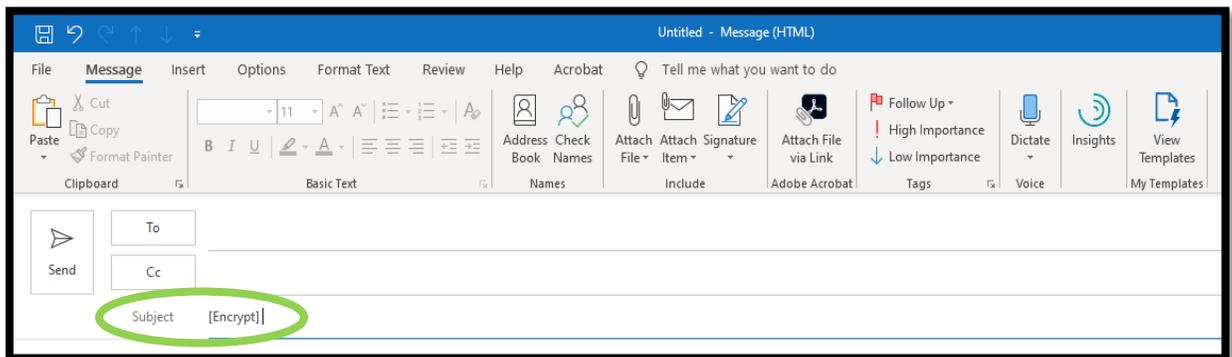


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Using Microsoft Outlook to Send Confidential Emails

Microsoft Office: Encrypt by Subject Line

1. Compose a new email.
2. Use **[Encrypt]** as the first word in your subject line, including the brackets, as shown below. This will automatically signal Outlook to send the message as an encrypted message.

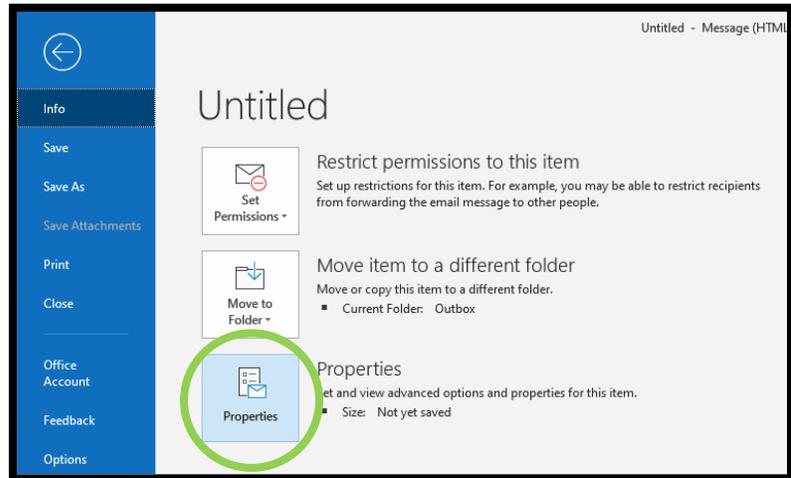


Tip: For more information on how recipients will open the messages, see the [Microsoft Office: Receiving Confidential Emails](#) section.

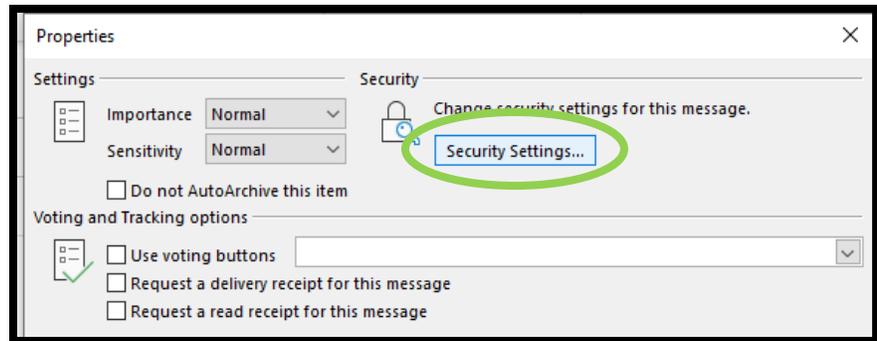
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Microsoft Office: Encrypt a Single Message

1. Compose a new email.
2. In message that you are composing, click the “File” tab and then select “Properties.”



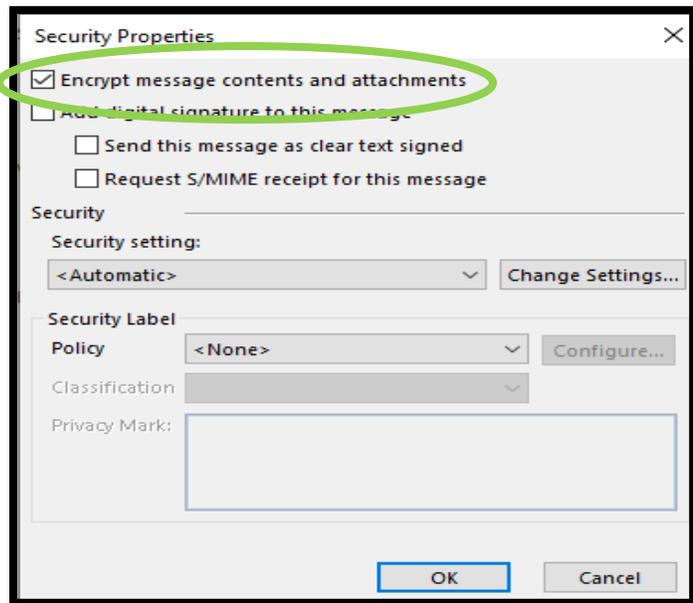
3. Click the “Security Settings” button.



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4. Under Security Properties, click the box in front of “Encrypt message contents and attachments.”
5. Click “OK.” The message is now encrypted, and you can compose the message as normal.

Tip: For more information on how recipients will open the messages, see the [Microsoft Office: Receiving Confidential Emails](#) section.



Microsoft Office: Key Points When Using Encryption

Replying or Forwarding

- Your ability to reply to or forward an encrypted message depends upon the sending organization's policies. If you do not see a **Reply**, **Reply All**, or **Forward** link, it is because the sender of the message cannot allow recipients to reply to or forward the message.
- When you reply to a message, your reply will be sent securely.

Adding Recipients

- The ability to add or edit the recipient list when you reply to a message depends upon the sending organization's policies. The **To** and **CC** recipient fields will either be fixed so that you cannot change them, or you will be allowed to add or delete recipients from these fields. Separate multiple recipients with a comma.
- When you forward a message, you can always edit the recipient list.

Note: The sender's organization has the option to restrict secure messages to specific domains. If this is the case, you will see an error message if you try to forward a secure message to a recipient that is not allowed to receive it.



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Send me a copy

- Proofpoint Encryption does not automatically place a copy of a secure message in your *Sent* folder. Click **Send me a copy** when you forward or reply to a secure message so that a copy will be sent to your address for your records.

Adding an Attachment to Encrypted Email

- If you want to add an attachment to a message, click the **Attach a file** link. Navigate to the file you want to attach and then click the **Add** link. The name of the attached file displays in the dialog box. Click **Upload** when you are done adding attachments.
- To delete an attachment from a message, click the **X** link to the right of the attachment.

Note: The (combined) attachments cannot exceed 15 MB in size.

Resetting Your Expired Password

- Your email administrator can force your password to expire after a designated period of time according to your organization's security policies. You will see a "Days until password expiration" message when you read or compose a secure message. Click the link to reset your password. If your password expires before you have a chance to reset it, you will be prompted to reset your password the next time you try to compose or read a secure message.
- You may also be required to reset your password the first time you log in to Proofpoint Encryption depending on how your account was initially set up by the administrator. Or, if you forgot your password and your administrator gives you a new temporary password, you will be required to reset it and select new security questions.

Reading a Secure Message on a Smart Phone

- Various smart phones cannot download files, and some smart phones modify HTML files. Since your secure message is sent to you as an HTML attachment, you may not be able to read it on your smart phone. If you have trouble reading your secure message, follow the instructions to forward the message to another server. You will then be able to download the message from the server to read it.

Troubleshooting Error Messages

- **You authenticated successfully, but do not have permission to decrypt this message.** You do not have permission to decrypt this message. Or, the administrator has disabled your ability to decrypt the message. Contact your email administrator.
- **You authenticated successfully, but the decryption key for your message has been deleted.**



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The decryption key for this message has expired or has been deleted. Contact your email administrator.

- **There was a critical error processing your request. There may be a problem with the system or your request.**

Proofpoint Encryption is temporarily unavailable. If this situation persists, contact your email administrator.

- **The message you are trying to read is corrupted and cannot be processed. Please contact the sender of the message.**

The message is corrupted and cannot be decrypted. Contact the sender of the message.

- **The page you requested was not found. If you clicked a link to get here, click the Back button in your browser to return to the previous page.**

The page you are trying to view in the browser is not available or does not exist. Click the Back button in your browser.

- **The username you requested has already been registered.**

You have already authenticated with Proofpoint Encryption.

- **There was an error retrieving the key for your message. If this error persists, please contact your administrator.**

The key server is temporarily unavailable. Try again later, and if you still cannot decrypt the message, contact your email administrator.

- **Your account has been disabled.**

Your email administrator has disabled your account.

- **Login Disabled**

You do not have permission to perform this action.



RI SHIP Remote Medicare Counseling Tools

Microsoft Office: Additional Troubleshooting Concerns

Error with Large HTML Secure Messages

- If your HTML message contains more than 500 KB of content, you may encounter a "Large Message Warning" error message. This limitation applies to Firefox 3.X or Internet Explorer browsers when you reply to the message or forward it. This limitation does not apply to plain text.

Intermittent Problem with Replying to or Forwarding Secure Messages

- If Proofpoint Encryption hangs when you try to compose a message and click the Reply, Reply All, or Forward links, click Cancel and try again. If the original text of the secure message does not display in the browser, refresh the browser or close the browser and open it again. The behavior is infrequent, intermittent, and typically works the second time around.

If you use Outlook 2007 on Windows Vista

- Do not save the *SecureMessageAtt.htm* attachment to disk and then try to open it. Open it from the email message.

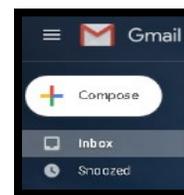
Using Gmail to Send Confidential Emails

You can send messages and attachments with Gmail's confidential mode to help protect sensitive information from unauthorized access. You can use confidential mode to set an expiration date for messages or revoke access at any time. Recipients of the confidential message will have options to forward, copy, print, and download disabled.

Note: Although confidential mode helps prevent the recipients from accidentally sharing your email, it doesn't prevent recipients from taking screenshots or photos of your messages or attachments. Recipients who have malicious programs on their computer may still be able to copy or download your messages or attachments.

Gmail: Creating a Confidential Email

1. Click the "Compose" button to start a new email.



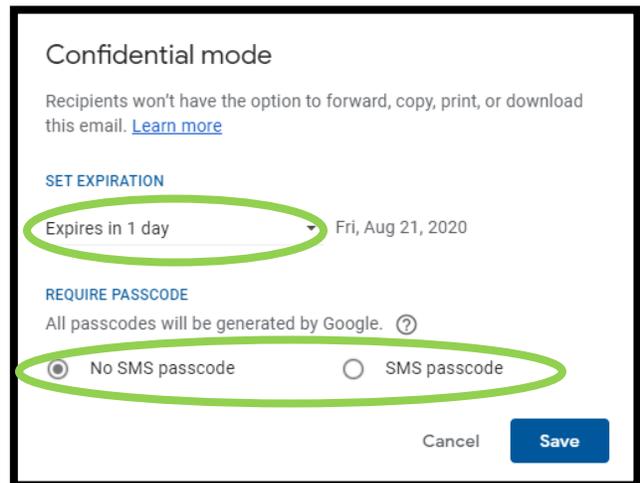
RI SHIP Remote Medicare Counseling Tools

2. In the bottom right of the window, click Turn on confidential mode by clicking this button .



Tip: If you've already turned on confidential mode for an email, go to the bottom of the email, then click Edit.

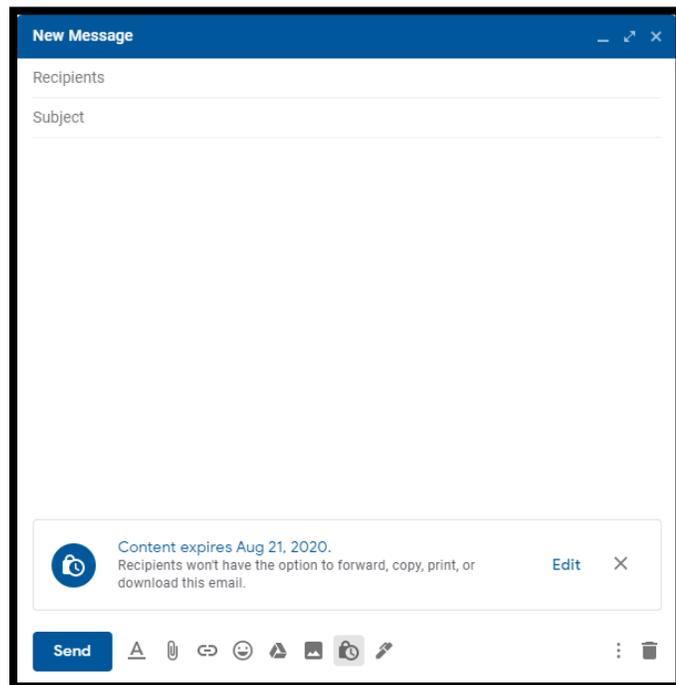
3. Set an expiration date and passcode. These settings impact both the message text and any attachments.
- If you choose "No SMS passcode," recipients using the Gmail app will be able to open it directly. Recipients who don't use Gmail will get emailed a passcode.
 - If you choose "SMS passcode," recipients will get a passcode by text message. Make sure you enter the recipient's phone number, not your own.



RI SHIP Remote Medicare Counseling Tools

4. Click “Save.”
5. The email will appear like the message on the right. Compose the message as normal.

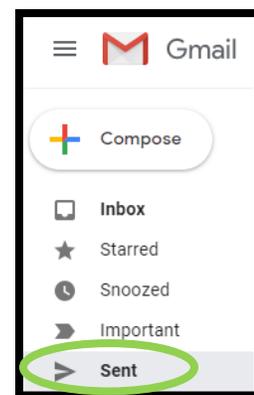
Tip: For more information on how recipients will open the messages, see the [Gmail: Receiving Confidential Emails](#) section.



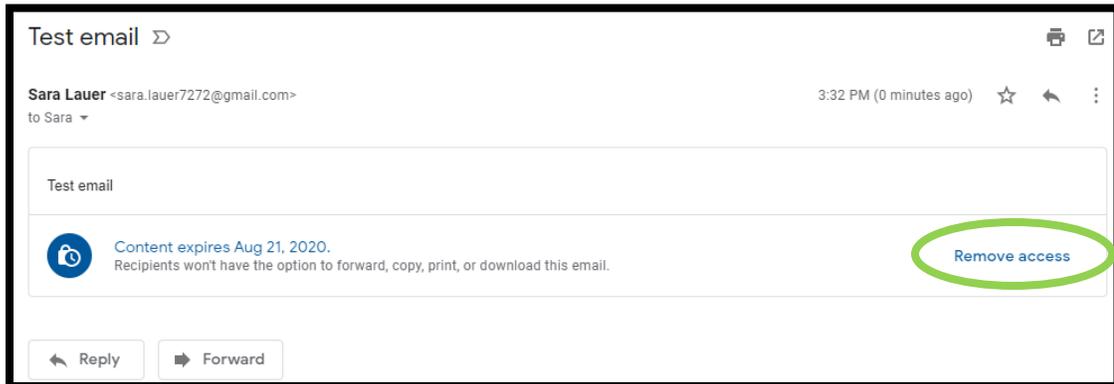
Gmail: Remove Access Early to a Confidential Email

You can stop your recipient from viewing the email before the expiration date.

1. Open Gmail.
2. On the left, click the “Sent” link.
3. Find the confidential email and double click on it to open the email.
4. Click “Remove access” on the right side of the email.



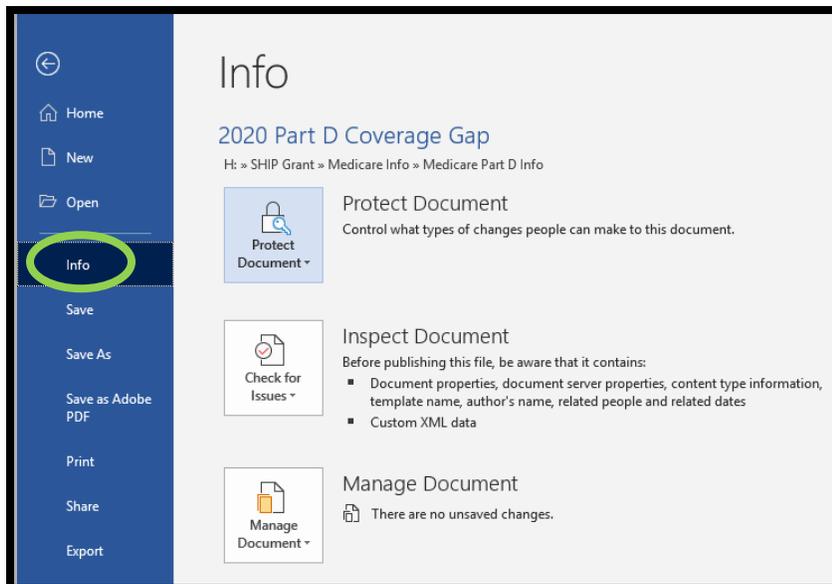
RI SHIP Remote Medicare Counseling Tools



Creating a Microsoft Word Password-Protected Document

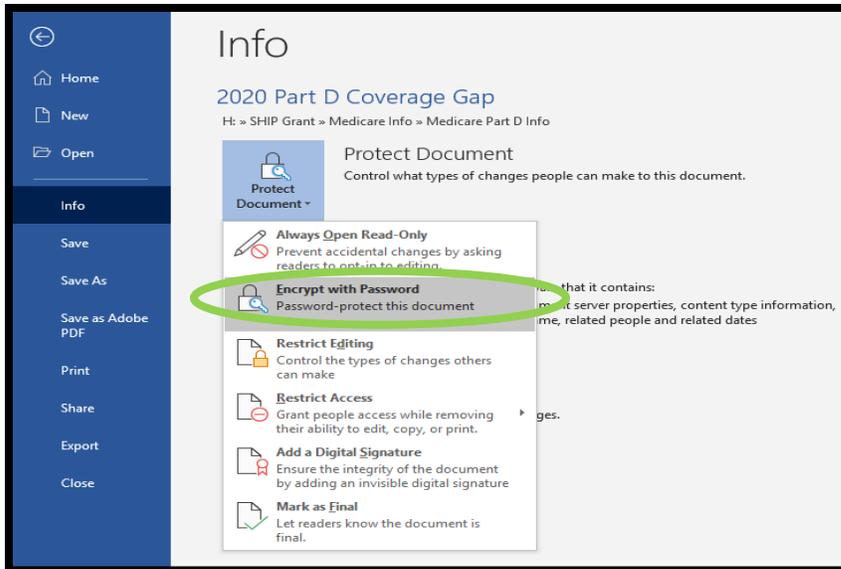
Microsoft Word: Creating a Password-Protected Document

1. Open a word document in Microsoft Word.
2. Click the "File" tab and then select the "Info" section.

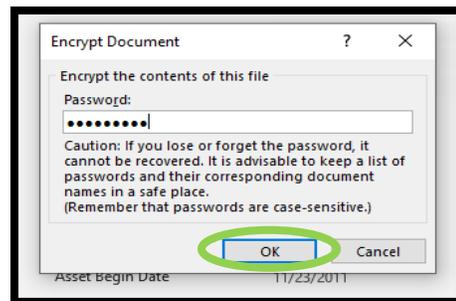


RI SHIP Remote Medicare Counseling Tools

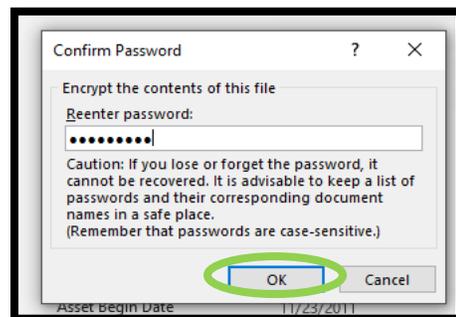
- Click the “Protected Document” button to open the dropdown and then select “Encrypt with Password.”



- In the Encrypt Document pop-up type a password, and then click “OK.”

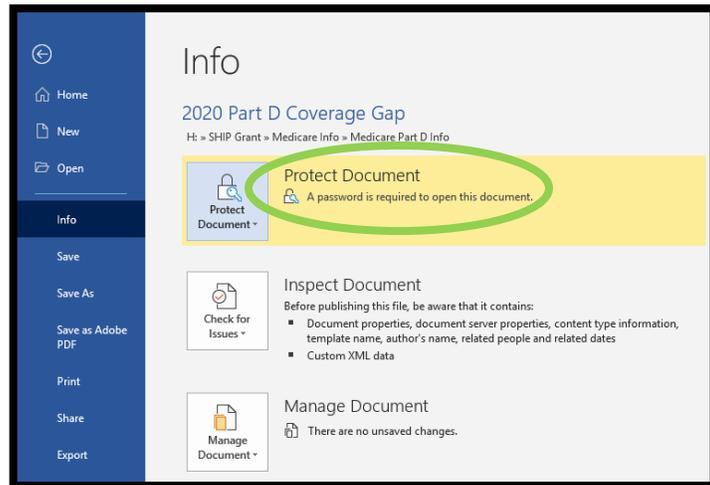


- In the Confirm Password pop-up, reenter the password again, and then click “OK.”



RI SHIP Remote Medicare Counseling Tools

6. If the password was accepted, your word document will then display “A password is required to open this document” under the Protect Document heading.

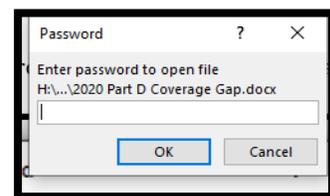


7. Attach the document to your email. Call the recipient to give them the password over the phone or send it in a separate email.

Tip: For more information on how recipients will open a protected Microsoft Word document, see the [Microsoft Word or Adobe PDF: Receiving a Password-Protected Document](#) section.

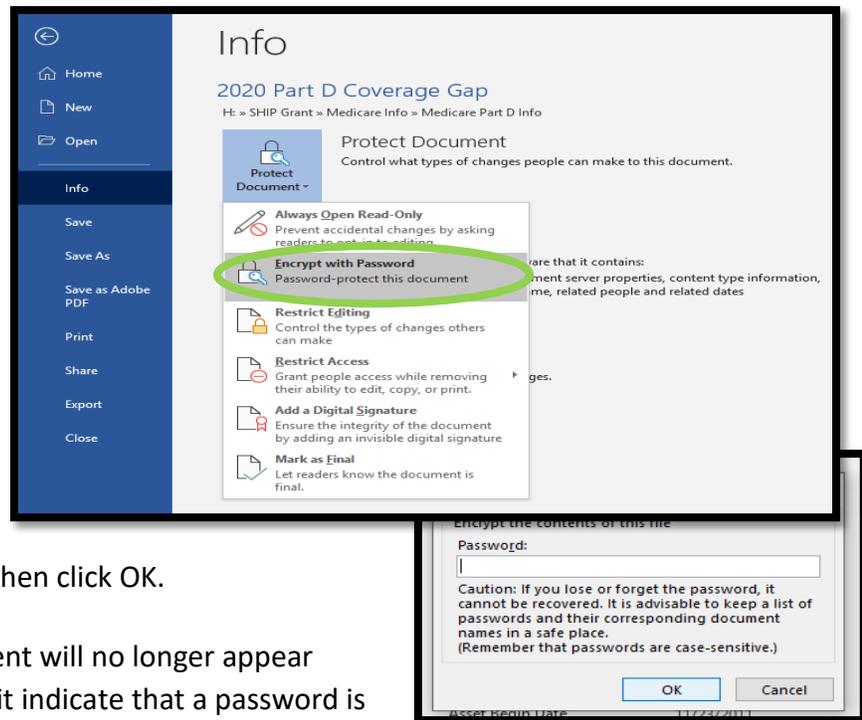
Microsoft Word: Remove Password-Protected Security

1. Open the document and enter the password that was created.



RI SHIP Remote Medicare Counseling Tools

2. Click on the “File” tab, then click the “Info” link, then click the “Protect Document” button, and select “Encrypt with Password” from the dropdown.
3. Clear the password in the Password box, and then click OK.
4. The Protect Document will no longer appear highlighted nor will it indicate that a password is required to open the document.



Creating an Adobe Acrobat Password-Protected Document

You can limit access to a PDF by setting passwords and by restricting certain features, such as printing and editing. However, you cannot prevent saving copies of a PDF. The copies have the same restrictions as the original PDF. Two types of passwords are available:

- **Document Open Password** – (also known as a *user* password) requires a user to type a password to open the PDF.
- **Permissions Password** – (also known as a *master* password) requires a password to change permission settings. Using a permissions password, you can restrict printing, editing, and copying content in the PDF. Recipients don’t need a password to open the document in Reader or Acrobat. They do need a password to change the restrictions you've set.

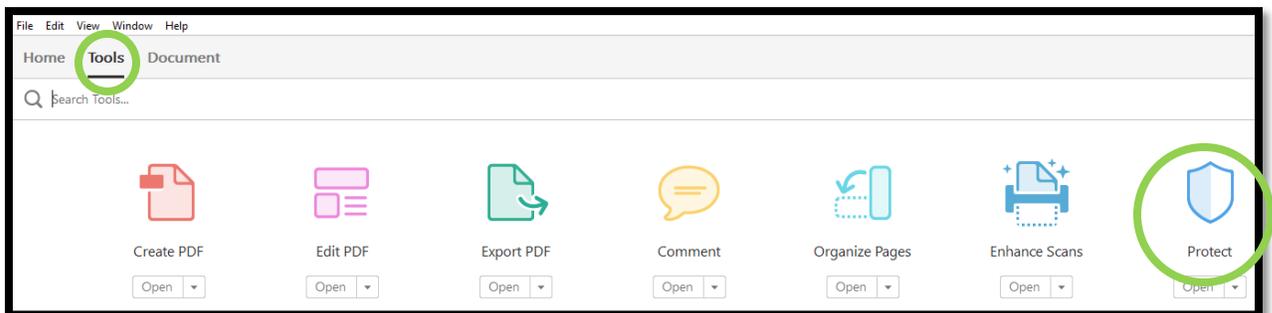
RI SHIP Remote Medicare Counseling Tools

If the PDF is secured with both types of passwords, it can be opened with either password. However, only the permissions password allows the user to change the restricted features. Because of the added security, setting both types of passwords are often beneficial.

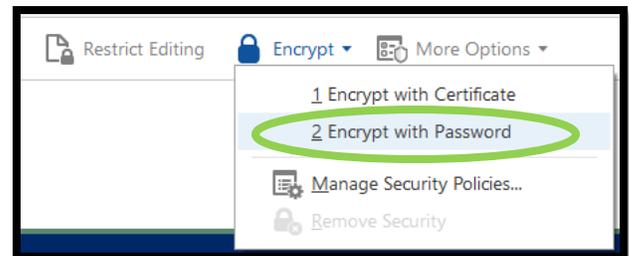
Note: You cannot add passwords to a signed or certified document.

Adobe Acrobat: Creating a Password-Protected PDF Document

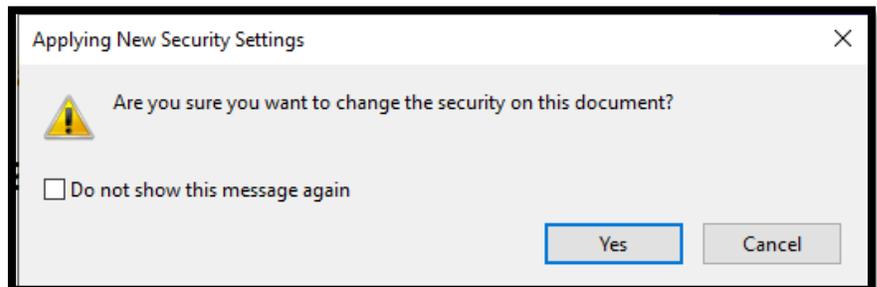
1. Open the PDF.
2. Click on the “Tools” tab, then click the “Protect” button.



3. You are returned to the document. Click the “Encrypt” dropdown at the top of the screen and select “Encrypt with Password.”

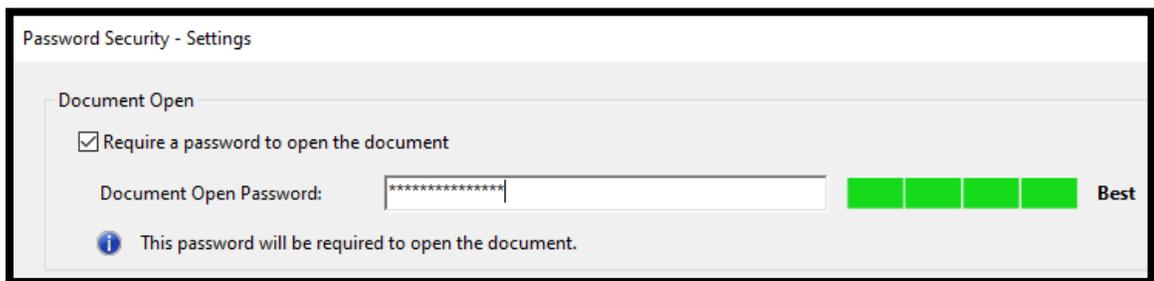


4. If you receive a prompt, click “Yes” to change the security.



RI SHIP Remote Medicare Counseling Tools

- Under Password Security – Settings, click the box in front of “Require a password to open the document,” then type the password in the corresponding field. The password strength is displayed next to your password to indicate whether the chosen password is weak, medium, strong, or best.



Password Security - Settings

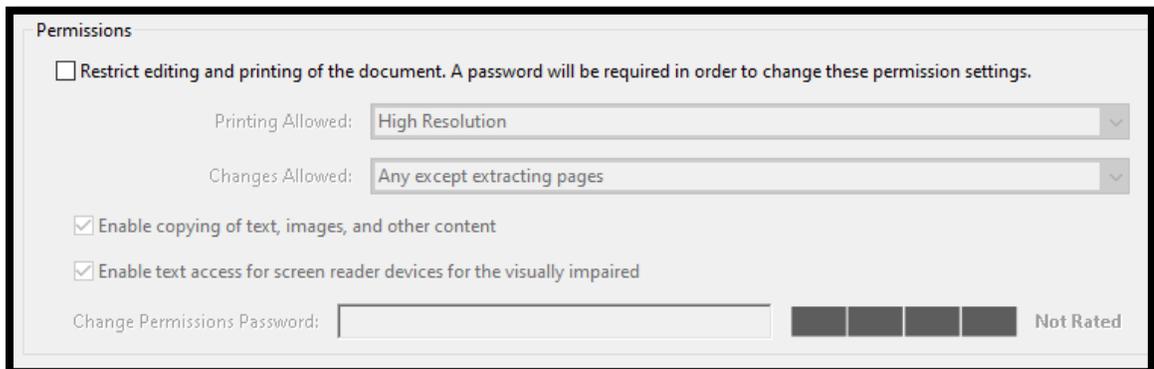
Document Open

Require a password to open the document

Document Open Password: ***** Best

i This password will be required to open the document.

- Under the Permissions section, make changes only if you do not want the recipient to edit or print the document.



Permissions

Restrict editing and printing of the document. A password will be required in order to change these permission settings.

Printing Allowed: High Resolution

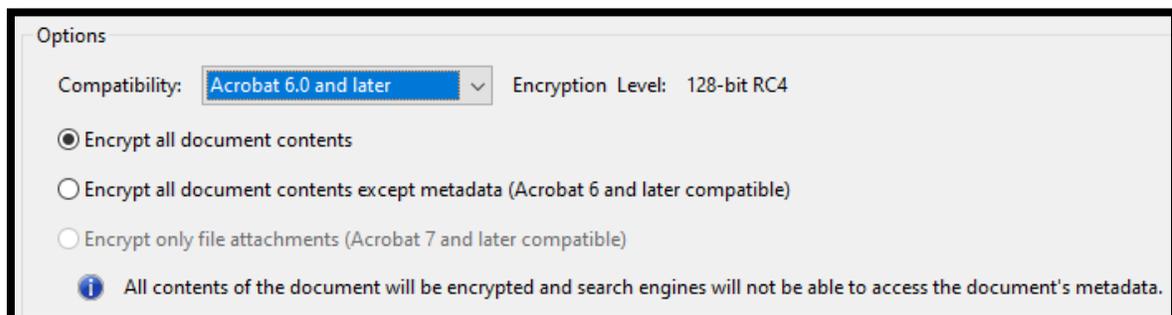
Changes Allowed: Any except extracting pages

Enable copying of text, images, and other content

Enable text access for screen reader devices for the visually impaired

Change Permissions Password: Not Rated

- Under the Options section, change the Compatibility option to be the lowest version available.



Options

Compatibility: Acrobat 6.0 and later Encryption Level: 128-bit RC4

Encrypt all document contents

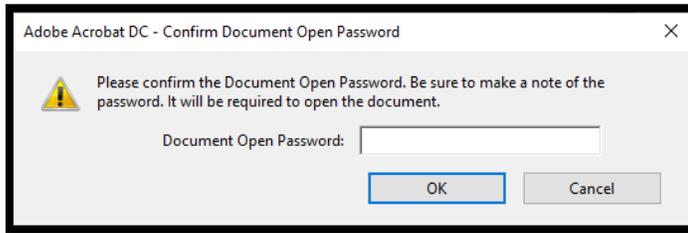
Encrypt all document contents except metadata (Acrobat 6 and later compatible)

Encrypt only file attachments (Acrobat 7 and later compatible)

i All contents of the document will be encrypted and search engines will not be able to access the document's metadata.

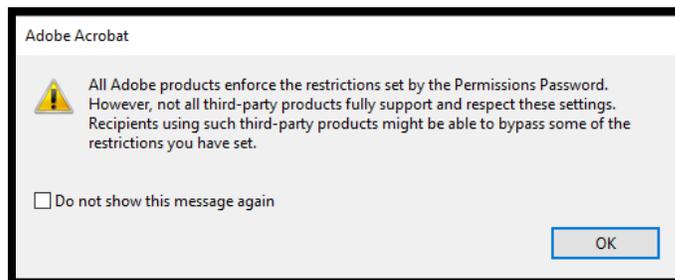
RI SHIP Remote Medicare Counseling Tools

- Click "OK" at the bottom of the pop-up.
- Confirm the Document Open Password by retyping it in the pop-up and then click "OK."

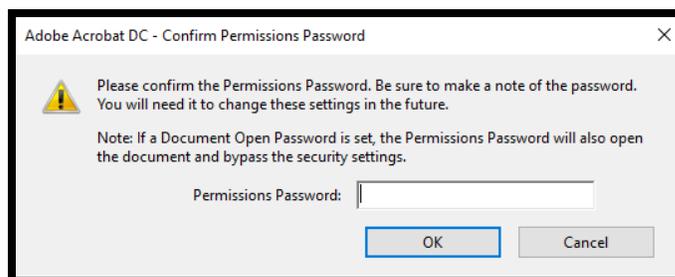


Note: If you also restricted editing and printing in the permissions section, you also receive the following pop-ups:

- Acknowledge that all Adobe products enforce the restrictions set by the Permissions Password, but all third-party products may not. Click "OK."

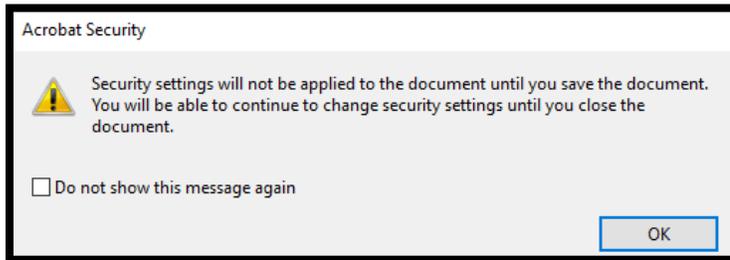


- Confirm the Permissions Password by retyping it in the pop-up and then click "OK."



- Click "OK" to the following pop-up that let you know the security settings will not be applied until you save the document.

RI SHIP Remote Medicare Counseling Tools



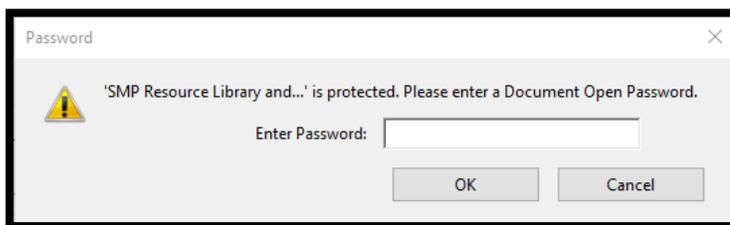
11. Save the document to save the security settings.
12. Attach the document to your email. Call the recipient to give them the password over the phone or send it in a separate email.

Tip: For more information on how recipients will open a protected Microsoft Word document, see the [Microsoft Word or Adobe PDF: Receiving a Password-Protected Document](#) section.

Adobe Acrobat: Remove Password-Protected Security

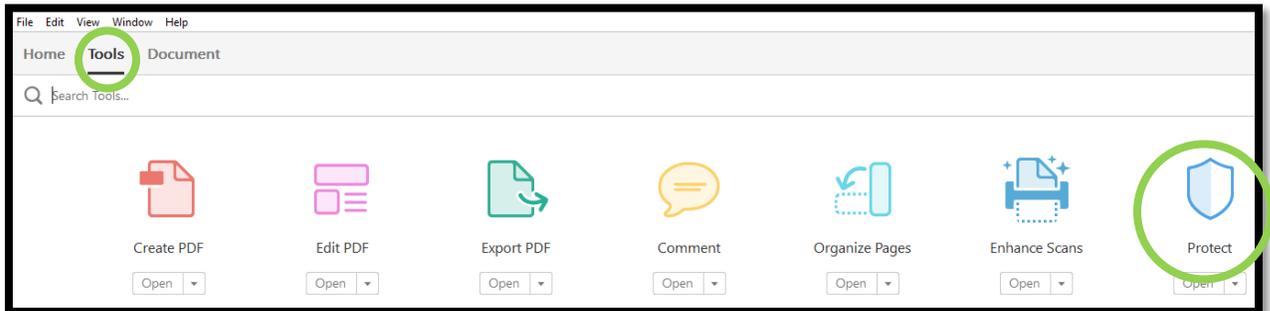
You can remove security from an open PDF if you have the permissions to do so. If the PDF is secured with a server-based security policy, only the policy author or a server administrator can change it.

1. Open the PDF.
2. Enter the Document Open Password to access the document and then click "OK."

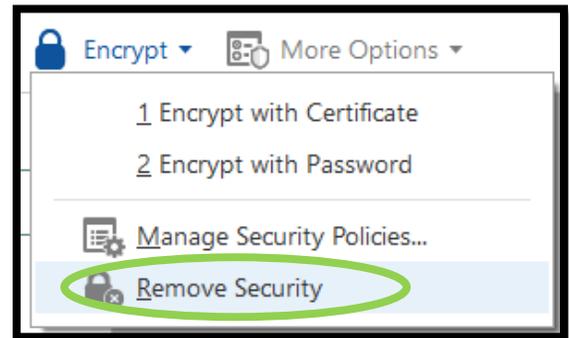


3. Click on the "Tools" tab, then click the "Protect" button.

RI SHIP Remote Medicare Counseling Tools

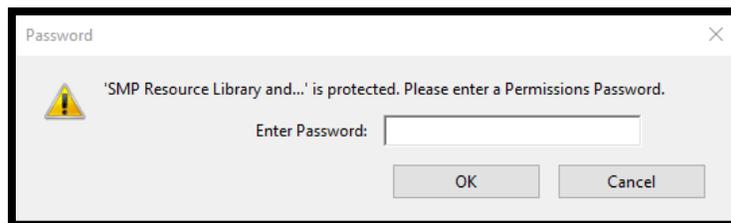


4. You are returned to the document. Click the “Encrypt” dropdown at the top of the screen and select “Remove Security.”



Note: If you also restricted editing and printing in the permissions section, you receive the following pop-up first:

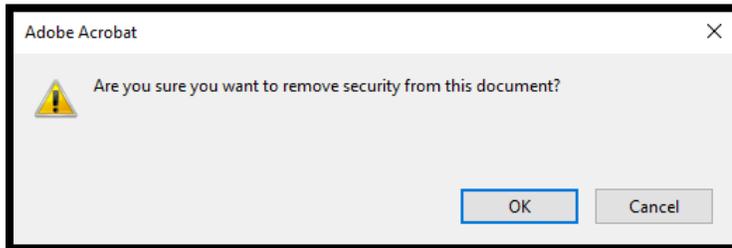
- The first pop-up will have you enter your Permissions Password and then click “OK.”



5. Click “OK” to the pop-up asking if you are sure you want to remove security from the document.



RI SHIP Remote Medicare Counseling Tools



Using Fillable Online Forms to Collect Confidential Information

A form that is website based that can be shared via a link is a secure way to collect beneficiary information. Here are a few HIPAA compliant companies that offer online form services:

Option	Details	Cost	Link
LUXSC	Base package offers 25 unique forms for you to publish and up to 5,000 submissions per day	\$50.00 a month	https://luxsci.com/package-levels.html
JotForm	10,000 monthly submissions, up to 100 forms, unlimited fields	\$29.00 a month	https://www.jotform.com/pricing/
Hushmail	Up to 10 webforms and 10 secure email accounts	\$39.00 a month	https://www.hushmail.com/business/healthcare/hipaa-compliant-email/?source=website&tag=page_business_sidebar_menu
SeamlessDoc	Operates at state government level	Quote needed	https://seamlessdocs.com/



RI SHIP Remote Medicare Counseling Tools

Fillable Online Form: Example

2020 Open Enrollment Period Request for Comparison

I understand by completing this form and submitting my information to the SHIP-SMP Program my information will be kept confidential. I also give the SHIP-SMP Staff and Counselor permission to contact me about the comparison.

Yes
 No

Name

First Name * Last Name *

Mailing Address

Street Address *

City * State * Zip *

Phone Number

Email Address

County of Residence *

What is your Medicare Claim Number on your Medicare card? *

What is your Part A effective date?

Month * Day * Year *

What is your Part B effective date?

Month * Day * Year *

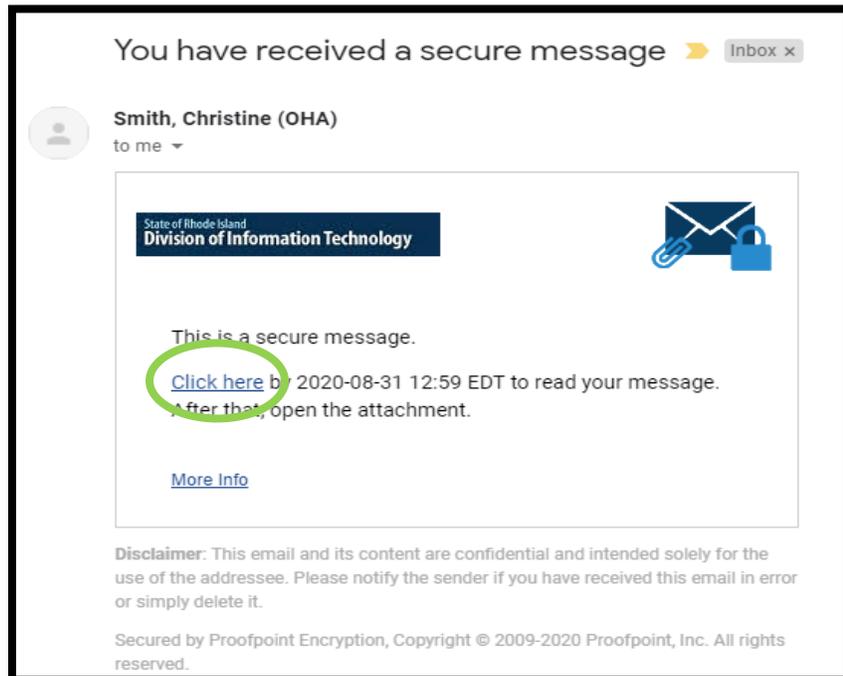


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Beneficiaries and Receiving PPI Guidance

Microsoft Outlook: Receiving Confidential Emails

1. A counselor will send you an email that will appear like the following. Once received, click on the “Click Here” link to open the message.





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2. You will be brought to the following screen.
 - If you have already registered, or if your account already exists, you will be prompted to sign in and enter your password to decrypt the message. Click “Continue.”
 - If you have not registered for Proofpoint Encryption, you will be prompted to create an account and choose a password on the Registration page. Click “Continue” when you are done. In the future, you will not be prompted to register.

State of Rhode Island
Division of Information Technology

Registration

Create your account to read secure email.

Email Address: cs1425@gmail.com

First Name:

Last Name:

Password:

Confirm Password:

Question : Your childhood best friend

Answer:

Continue

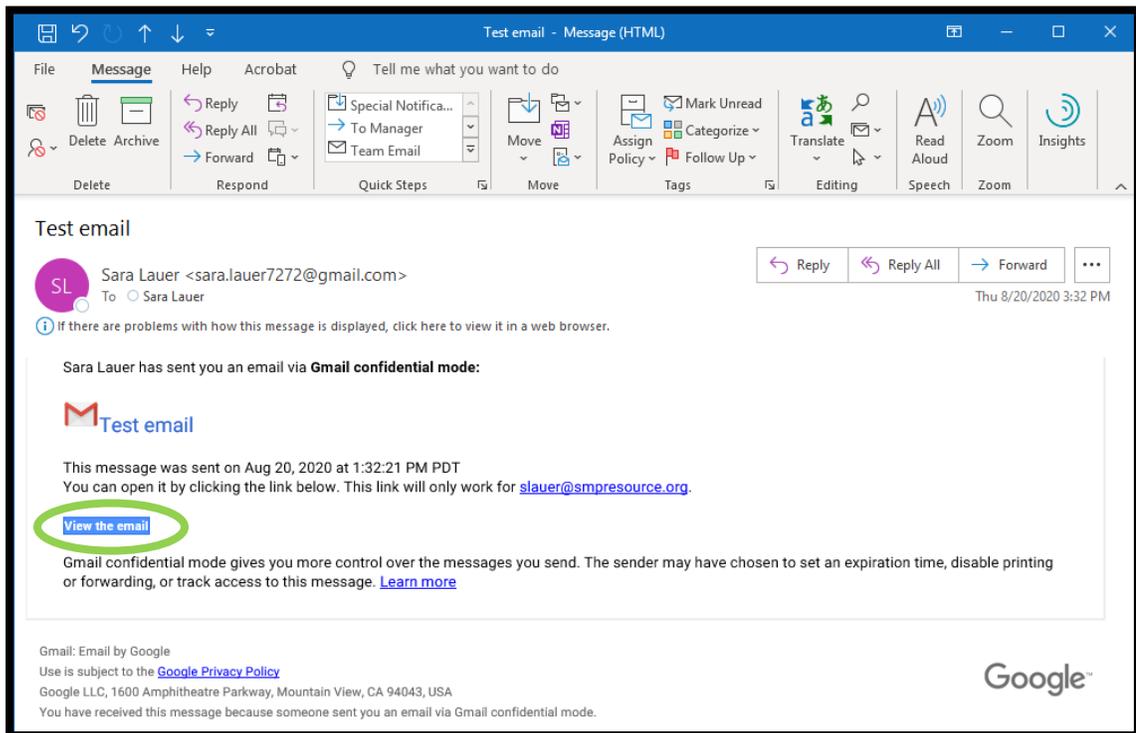
Note: If you sign in, and the Login screen returns with a field that you can edit for your username, it means Proofpoint Encryption found a record for you, but the email address is different - perhaps an email alias. Enter a different address to sign in. For example, a record for jsmith@example.com exists, but you entered joe@example.com - your alias for jsmith.

Tip: Forgot your password? If Proofpoint Encryption is configured to allow you to reset your password, click the Forgot Password link. You will be prompted for your security question. Create a new password for your account.

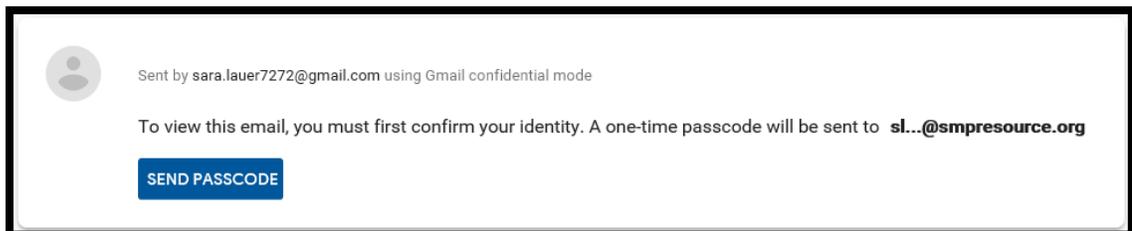
Gmail: Receiving Confidential Emails

1. A counselor will send you an email that will appear like the following. Once received, click on the “View the email” link to open the message.

RI SHIP Remote Medicare Counseling Tools



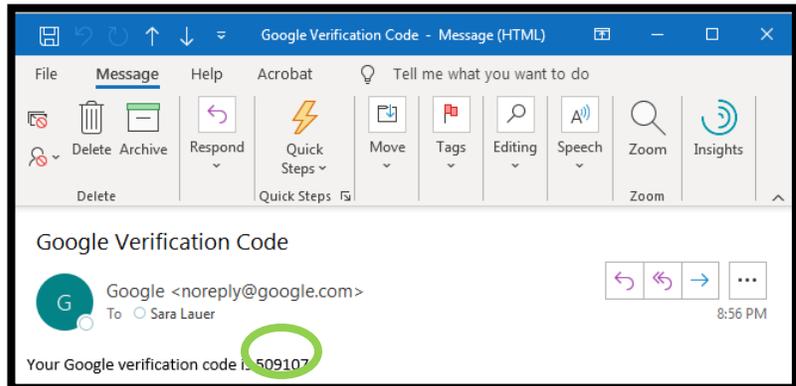
- To view the email, you must first confirm your identity. Click the “Send Passcode” button.



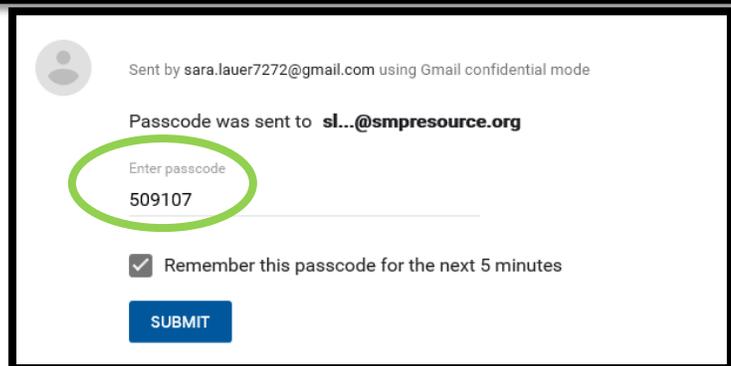
Note: If you are accessing the email using the Gmail app (mobile or desktop), you will not be asked to confirm your identity and the message will automatically open instead.

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- You will receive an email with the verification code.



- You will then need to enter the code from the email into the verification pop-up in the "Enter passcode" field and click then click the "Submit" button.



NOTE: Because the sender used the confidential mode to send the email:

- You can view the message and attachments until the expiration date or until the sender removes access.
- Options to copy, paste, download, print, and forward the message text and attachments will be disabled.
- You might need to enter a passcode to open the email.

Gmail: Error Messages

- Email has expired** - The sender might've deleted the email or removed your access before the expiration date. Contact the sender to give you more time or to resend the email.
- Switch accounts** - Make sure you're signed into the correct Google Account that's associated with the recipient email. Then, try to open the email again.



RI SHIP Remote Medicare Counseling Tools

- **Provided number is for an unsupported country** - You can only add SMS passcodes for phone numbers from these regions: North America; South America; Europe; Australia; Asia: India, Korea, and Japan.

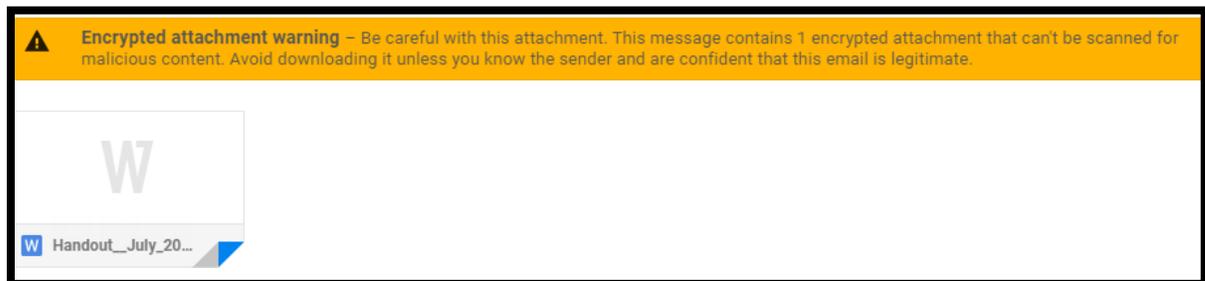
Gmail: Additional Notes

Because the sender used the confidential mode to send you an email:

- You can view the message and attachments until the expiration date or until the sender removes your access.
- Options to copy, paste, download, print, and forward the message text and attachments will be disabled.

Microsoft Word or Adobe PDF: Receiving a Password-Protected Document

1. When a counselor sends a password-protected Word or PDF document as an attachment to an email, you will see a warning message similar to these from Gmail. This just lets you know the attachment is encrypted.





RI SHIP Remote Medicare Counseling Tools

2. You will need a password to view the attachment. You will receive the password in one of two ways.
 - The counselor will call you and tell you the password over the phone
 - The counselor will send you a separate email with the password in it

Note: If you do not receive the password, reach out to the counselor to have the resend it to you.

3. Once the email is received, open the attached Word document. You will receive the following pop-up. Enter the password in the open field and then click “Submit” to open the Word document.

Please enter this document's password to view it

Submit

First Name: _____ Last Name: _____ Date: _____

Representative Name: _____ Relation: _____

Client Address: _____ City: _____ Zip Code: _____

Phone: _____ County: _____

Cell Phone: _____ Email: _____

Remember to fill out a Client Agreement & Authorization Form.

CURRENT COVERAGE (check all that apply)

Original Medicare

COBRA Insurance

Medicare Advantage Plan

Employers Group Plan

Part D Prescription Drug Plan

Federal Employee Group Plan

Supplement Insurance (Medigap)

Military Coverage

Veterans Benefits (VA)

Medicaid

TRICARE

TRICARE-for-Life (TFL)

MONTHLY INCOME / ASSETS (check all that apply)

LIS/Extra Help \$1,615/ \$14,610 (Individual) \$2,175/ \$29,160 (Couple)

MSP \$1,456/ \$7,860 (Individual) \$1,960 / \$11,800 (Couple)

Social Security Disability

NOTES: _____

Last Name _____ Zip Code _____

Medicare # _____ Part A _____ Part B _____

DOB: _____

MyMedicare.gov Username: _____ Password: _____

Pharmacy preference 1: _____ Pharmacy phone: _____

Pharmacy preference 2: _____ Pharmacy phone: _____

NAME OF DRUG	DOSAGE	HOW OFTEN TAKEN
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		

NOTES: _____

Interim COVID-19 Guidance for Community Gathering Facilities Offering the Rhode Island Office of Healthy Aging Programs

The Rhode Island Office of Healthy Aging (OHA) is committed to empowering Rhode Islanders to age strong. OHA's core constituency is people age 55 or older and adults living with a disability. Due to the greater risk for complications from COVID-19 infection among these groups, OHA is taking every precaution to prevent the spread of the disease and has compiled the following guidance, in partnership with the Rhode Island Department of Health (RIDOH), to assist its partners in supporting this end.

This guidance is intended to help community gathering facilities, such as senior centers and community meal sites, make more informed decisions about COVID-19-related reopening plans, with the goal to minimize the risk of COVID-19 exposure to staff, participants, and volunteers – and to contain the spread of the virus. OHA does not regulate these facilities. As such, reopening decisions should be made in line with local policies and decision-making protocols, bearing the below guidance in mind. Understanding that those who are older or have underlying health conditions are most vulnerable during this pandemic, we recommend these guidelines are followed to the greatest extent possible.

The goal is for facilities to initially implement plans that have the lowest possible risk. For instance, all other factors being equal and with appropriate health and safety protections in place, an activity that is outdoors would pose less risk than one that takes place indoors.

Phase III ([Executive Order 20-50](#)) began June 30, 2020. The total number of people allowed to gather at one time increased, and most businesses are reopening with new guidelines. Rhode Islanders are living while physically distancing and wearing cloth face coverings. Travel and other restrictions continue in order to keep Rhode Islanders safe and healthy.

Overarching Tasks and Policies

Recommended:

- Evaluate current policies to see if any changes or modifications need to occur in an effort to follow the below guidelines.
- Finalize any policies and procedures in relation to reopening, including, but not limited to Personal Protective Equipment (PPE) requirements, actions related to non-adherence to guidelines, limitation on shared items (books, puzzles, etc.), establishment of smaller group activities, and offering lower risk activities.
- Determine your specific needs and begin procurement of needed materials and supplies for reopening.
- Educate and train your staff about your plan and prepare information for dissemination to the public.

Required:

- Complete a COVID-19 Control Plan (available on Reopening RI's website in [English](#) or in [Spanish](#)).

REOPENING RI

Physical space and occupancy limits

Specific guidance for community gathering facilities offering OHA programs:

- Maintain six feet between all persons at all times. Post signage to remind people of physical distancing.
- Consider your space capacity. What is being suggested for houses of worship is to limit occupancy to 66% of the worship area's maximum permitted occupancy level; indoor dining is limited to 66% of capacity and other restrictions including physical distancing. [RIDOH regulations for all covered entities](#) are posted on RIDOH's website.
- Cancel or postpone special events, such as festivals, holiday events, and special performances.
- Do not allow outside groups to use the facility, at this time.
- Have one separate entrance and exit.
- Consider staggering reopening with participants arriving and leaving at different times of the day or dividing participants into two groups that rotate attendance every other day.

All organizations must follow the general guidance from RIDOH and any applicable Executive Orders, including those related to gathering sizes and physical distancing.

Adhere to gathering size restrictions

- RIDOH has published [requirements regarding gathering sizes](#), and they are posted on the RIDOH website. This guidance should be followed when holding meetings, conferences, or other social gatherings.
- Follow the gathering size limits for each phase. The entire [Reopening RI Plan](#) is posted online.
- When offering community meal and/or dining services, follow the [US Administration for Community Living's reopening guidelines for senior nutrition programs](#).
 - Implement communal dining practices such as those issued for Assisted Living Residences:
 - Dining room staff and volunteers must always wear masks or cloth face coverings.
 - Ensure physical distancing is maintained:
 - Limit number of participants per table (e.g. a table that usually accommodates four people should be limited to two people).
 - Tables must be spaced at least eight feet apart, allowing two feet for the moving of chairs while maintaining a physical distance of six feet.
 - Keep the same participants seated at the same table each day, so that each participant is in contact with the same small group.
 - Meals should be served restaurant style (individual servings/no buffet).
 - The sharing of condiments and serving utensils is discouraged.
 - Clean high-touch surfaces (e.g. chairs, tables) between seatings.
 - Ensure that processes are in place to prevent staff from cleaning used tableware (e.g. plates and cups) and then serving food. Consider the following steps:
 - Refrain from removing used plates and tableware from the table until all participants have finished eating.
 - Use specific staff to serve participants and refill drinks during the meals and a separate group of staff to clear plates and tableware from those who are finished.
 - Plates can be ceramic, provided strategies are in place that can reduce the movement of used dishware. Disposable dishes and utensils are acceptable.
- When offering physical fitness classes, follow the [guidance for gyms and fitness centers](#).



REOPENING RI

Apply social distancing measures

Follow the CDC's [social distancing guidance](#). All people should remain at least six feet apart at all times.

Promote physical distancing (at least six feet between all individuals)

- Implement steps to support physical distancing, such as repositioning furniture, mapping spacing on the floor with tape or other marking products and providing other visual signals.

Activities should be conducted in groups of five or fewer. Maintain stable groups for activities so that each participant is in contact with the same group, including the same staff.

Business processes, procedures, and activities

All community gathering facilities must have established cleaning, health screening, and program delivery procedures.

Enhanced cleaning and/or disinfecting procedures

- RIDOH requires at least twice-daily cleanings in settings with regular traffic, or between multi-group use in accordance with CDC guidelines and as [described in 216-RICR-50-15-7](#). Restrooms, commonly touched surfaces (shared workstations, elevator buttons, door handles and railings), and public use areas shall be cleaned at least once every four hours, and it is recommended to provide for individual sanitizing wipes.
- Specific to restrooms:
 - Make adjustments to promote physical distancing within restrooms (only use every other stall, sink, etc.), or take other steps as is practicable (including the posting of signage).
 - Clean commonly touched surfaces in restrooms (toilet seats, doorknobs, stall handles, sinks, paper towel/soap dispensers) with increased frequency in accordance with CDC guidelines.
- RIDOH requires that employers ensure that employees, customers, and visitors have access to soap and water and/or hand sanitizer containing at least 60% alcohol at all times.
- Allow time for cleaning between activities.
- Cleaning and disinfecting protocols should go beyond current measures.

Screening procedures

- RIDOH requires establishing, at minimum, symptom-monitoring procedures to screen all individuals entering a building or other workplace. People whose responses to screening questions indicate they are sick, or who show visible signs of illness, must be denied entrance and instructed to isolate.
 - Employers may also choose to supplement screening questions with temperature checks. CDC has posted [guidance on temperature checks](#) on its website.
 - RIDOH advises that an elevated temperature is 100 degrees Fahrenheit or higher.
- Anyone showing signs of illness of any kind or who may have been exposed to COVID-19 should not be in the community facility.
- Post a sign that states individuals (staff, participants, volunteers, etc.) who have fever, cough, or any sign of sickness should not enter the facility.
- Ensure that all staff are trained, especially in regard to recognizing COVID-19 symptoms.
- Ensure policies and expectations are communicated to both internal and external individuals and other community partners.
- There is a standardized COVID-19 Screening Tool available on Reopening RI in [English](#) and in [Spanish](#).

REOPENING RI

Arrival/Drop-off procedure

- Designate one entrance and assign staff or a volunteer, as applicable, to greet and screen participants. The staff or volunteer should not be a person at higher risk for severe COVID-19.
- Conduct daily health screening at the designated entrance on all individuals entering the building.
- After ensuring the participant, staff, or volunteer does not have any symptoms, have the person use hand sanitizer with at least 60% alcohol or wash hands for 20 seconds before full entry into the facility.
- When possible, operate with contactless entry: no signing-in or card swiping. If not possible, there must be a way to disinfect the writing implement or swipe card and machine between uses.
- If a person displays symptoms upon arrival or while at the facility, they must be sent home until cleared. If a participant develops any COVID-19 symptoms while at the program, staff should separate the person in the treatment room or quiet space away from other people. Staff should then call the participant's caregiver, if applicable, to inform them that their loved one is displaying symptoms and needs to be picked up from the program and taken home as soon as possible.
- Staff should monitor and discourage congregation at the arrival/drop-off area.
- If your facility provides transport to or from your location, please refer to the transportation guidance available on Reopening RI for [buses](#) and [cars/vans](#).

NOTE: If your program contracts for transportation with other entities to bring participants and/or volunteers to and from the program, you should check with these companies about their protocol for COVID-19 and then share that information with participants, volunteers, and staff.

Face masks and other PPE

- Staff, participants, and volunteers are required to wear face coverings unless the individual(s) can easily, continuously, and measurably maintain at least six feet of distance from others for the duration of their work and/or time in a building, pursuant to [Executive Order 20-04](#).
- Posters notifying anyone entering the facility of the requirement to wear a facemask are available on RIDOH's website in [English](#) and in [Spanish](#).
- Such protective coverings are not required for:
 - Anyone for whom use of such protective covering would be damaging to their health; or
 - When a face covering would inhibit an activity of daily living (e.g., eating).
- It is recommended that a facility keep, at minimum, a 15-day supply of PPE.
- PPE should not be shared by or between staff, participants, and volunteers.
- Provide several places throughout the building to wash hands or use alcohol-based hand sanitizer containing at least 60% alcohol.
- Train participants, employees, and volunteers in proper hand-hygiene practices.

Clear communications plan

- Develop a communications plan to explain the aspects of the reopening of operations to staff, participants, volunteers, and other target audiences (e.g., businesses) as appropriate.
- Determine appropriate materials and channels for communicating information. Examples include:
 - Developing and disseminating a one-page fact sheet;
 - Posting information and FAQs to your website;
 - Sharing information on social media;
 - Distributing information via municipal robo-call; and/or
 - Developing and sharing screening tools and signage for public buildings and businesses.
- Translate information into the languages most frequently spoken in your community.
- Continue to emphasize the importance of participants and employees staying home if they are sick.

REOPENING RI

Human Resources

[Guidance to minimize spread of COVID-19 among employees](#)

Each organization should have a plan that ensures anyone entering the facility, including employees, are subjected to daily health screenings. The plan should also detail how staff will maintain physical distance from each other and program participants. All efforts should be made to maintain a consistent work crew to reduce unnecessary exposure to multiple people.

Asymptomatic testing (testing for people without COVID-19 symptoms) is available to Rhode Islanders, and is focused on densely populated areas hardest hit by the pandemic. This testing is available for free at either Rhode Island College or the Community College of Rhode Island (Warwick campus) to those who work in close-contact environments. Visit the RIDOH's website to [learn about these options and schedule a test](#).

[Guidelines to assist individuals who are symptomatic and/or test positive for COVID-19, or are required to quarantine based on potential exposure](#)

Each facility should have a plan to ensure that employees who are required to isolate based on a positive test for COVID-19 or are required to quarantine as a result of exposure, can safely stay out of the workplace until cleared to return. The Point Healthy Aging Helpdesk is available at 401-462-4444 to assist anyone in need of supports during quarantine or isolation.

[Training plan in order to meet the safety guidelines proposed in the previous sections](#)

Each organization should develop a training plan to ensure that employees are able to meet the safety guidelines described throughout this guidance document.

Supplies

Each facility should develop a plan for obtaining and maintaining any additional supplies needed to safely operate upon reopening for in-person programs and services. Supplies likely needed for Phase III include:

- Face masks (cloth or surgical face masks are acceptable).
- EPA-approved disinfectant solutions or other general cleaning supplies (spray bottles, bleach, surface cleaners, etc.).
- Materials for hand washing stations (soap and water) and/or hand sanitizer bottles, containing at least 60% alcohol, at workstations.

[Suggested:](#)

- Hand sanitizers and hand sanitizer stations that are accessible to the public.
- Disinfectant wipe stations near communal objects.

Financing

OHA Rhode Island State Designated Grant recipients are able to repurpose their SFY2020 general revenue funding for COVID-19 related expenses. Please contact OHA at 401-462-3000 for more details.

Additional Resources

- [Senior Centers Connect Guide](#)
- [National Council on Aging's Guidance for Resuming On-Site Senior Center Operations](#)
- [US Administration for Community Living's COVID-19 page](#)
- RIDOH's [COVID-19 section](#)



Protecting Client Privacy & Confidentiality



RIDEA
May 2019

Training Objectives

Define confidentiality and its implications for SHIP & SMP counseling work.

Examine relevant confidentiality laws, policies, and implementation for SHIP & SMP operations.

Identify best practices.

Set expectations.

Meet CMS Unique ID training requirements.

What is “Confidentiality?”

- **“To Confide”** - to trust in someone
 - Especially when sharing secrets or private matters
- **“Confidence”** - firm belief, trust, reliance
 - Belief that another person will keep a secret, or “maintain strict confidence”
- **“Confidential”** - entrusted with private or secret matters

“It’s About Building & Maintaining Trust!”



Why is Confidentiality Important in SHIP and SMP Work?

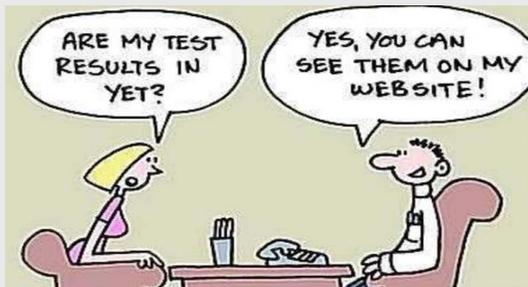
- It frees clients to share personal information that counselors need to do their work.
- It shows respect for, and helps protect clients.
- It builds the program’s reputation as a trusted, reliable resource.
- It helps prevent costly privacy and security breaches (e.g., legal fees and fines).

What Rules Affect Confidentiality in SHIP & SMP Work?

- 1) Federal Law
 - Health Insurance Portability and Accountability Act of 1996 (HIPAA)
 - Privacy Rule - privacy rights and access to records
 - Security Rule - data protection duties and penalties
- 2) State Law
 - Constitutional Privacy Rights in 11 states (not including RI)
 - Privacy (Data Breach) Acts - R.I. Gen. Laws §§ 11-49.3-1 et seq.
- 3) Agency Policies
- 4) Volunteer Risk & Program Management (VRPM) Policies
- 5) CMS Unique ID for SHIPs and SMPs

What is the HIPPA Privacy Rule?

HIPAA Privacy Rule - establishes national standards to protect individuals' medical records and other personal health information. The Rule requires appropriate safeguards to protect the privacy of personal health information, and sets limits and conditions on the uses and disclosures that may be made of such information without patient authorization.



Who Does HIPAA Apply To?

The following “covered entities” and their business associates must comply with HIPAA’s Privacy and Security Rules:

- **Health Plans**
 - Includes Medicare, Medicare Health Plans, Medicaid, Medicare Supplement Insurers (Medigap), Group Health Plans
- **Health Care Providers**
 - Hospitals, Nursing Facilities, Physicians, etc.
- **Health Care Clearinghouses**
 - Billing Services, Health Management Information Systems
- **Business Associates**
 - A person or organization that contracts with a covered entity to perform some of its functions

Does HIPAA Apply to SHIP & SMP?

The programs are not “covered entities” but...

Local cosponsors may be covered entities if they provide health care services or contract with those who do.

Most third parties with whom SHIPs & SMPs interact are covered entities (i.e., Medicare, Medicare Advantage plans, hospitals, doctor offices, 1-800-MEDICARE, etc.)

What is Individually Identifiable Health Information?

Information, including demographic data, that relates to:

- An individual's past, present or future physical or mental health or condition,
- Providing health care to the individual, or the past, present, or future payment for providing health care to an individual, and,
- Identifies the individual or gives a reasonable basis to use in identifying an individual.
- Individually identifiable health information includes common identifiers like: Name, Address, Birth Date, & Social Security Number.

What is Protected Health Information (P.H.I.)?

Individually identifiable health information that is explicitly linked to a particular individual, and health information which can allow individual identification. P.H.I. includes many common identifiers:

- Name
- Address
- Birth Date
- Social Security Number



What is Personal Protected Information (P.P.I.)?

Information which can be trace an individual's identity, such as:

- Name
- Biometric records, alone or when combined with other personal or identifying information which is linked or linkable to a specific individual, such as a data and place of birth, mother's maiden name, etc.”
- Social Security number
- Driver's license number or state-issued identification card number
- Financial account number, credit or debit card number, with or without any required security code, access code, personal identification number or password, that would permit access to a resident's financial account

Privacy Rule Required Disclosures

The Privacy Rule defines and limits the circumstances when covered entities may use or disclose an individual's P.H.I.

Covered entities may not use or disclose P.H.I. except as:

- The Privacy Rule requires or permits, or
- The individual/patient (or personal representative) authorizes in writing – RI SHIP Release Form

The Privacy Rule requires covered entities to disclose P.H.I. in only two situations:

- 1) To individuals (or their personal representatives) specifically when they request access to, or an accounting of disclosures of, their protected health information; and
- 2) To the Department of Health & Human Services (HHS) when it undertakes a compliance investigation or review, or an enforcement action

Privacy Rule Permitted Disclosures Cont.

The Privacy Rule permits covered entities to use and disclose *P.H.I.*, without an individual's authorization, in six (6) situations:

- 1) To the individual (unless required for access or accounting of disclosures);
- 2) For treatment, payment, and health care operations (basis for the CMS Unique ID system)
- 3) When the individual would have an opportunity to agree or object if not incapacitated
- 4) Incident to an otherwise permitted use and disclosure
- 5) For public interest and benefit activities, and
- 6) For research, public health or health care operations in a limited data set.

Privacy Rule Protections

An individual has rights under the Privacy Rule to:

- Receive notice about a provider's privacy practices
- Review and obtain a copy of their P.H.I. in a covered entity's designated record set
- Have covered entities amend their protected health information in a designated record set when that information is inaccurate or incomplete
- An accounting of P.H.I. disclosed by a covered entity
- Request a covered entity to restrict P.H.I. disclosure
- Request alternate means or location for receiving communications of P.H.I., other than those typically used

State Privacy Protection Law

"Rhode Island Identity Theft Protection Act of 2015" - R.I. Gen. Laws §§ 11-49.3-1 et seq.

- Apply to individuals and organizations, including non-profit agencies
- Define “personal protected information,” or PPI
- Prescribe process for notifying people affected by a security or data breach
- Fine for breaches
 - Reckless Violation - \$100
 - Knowing and Willful Violation - \$200

What is the HIPAA Security Rule?

Electronic Protected Health Information (E-P.H.I.) - that is created, received, maintained or transmitted in an electronic form. This includes:

- Transmitted over the Internet (e.g., email)
- Stored on a computer, a CD, a disk, magnetic tape, or other related means.
- Stored on personal devices (e.g., cell phones and tablets)
- Requires covered entities to:
 - Ensure confidentiality and integrity of all e-P.H.I.
 - Identify and protect against anticipated security threats
 - Protect against anticipated impermissible uses or disclosures
 - Ensure compliance by their workforce through training and oversight.

Security Rule Safeguards

Covered entities must protect against reasonably anticipated threats to, and impermissible uses and disclosures of, P.H.I. by:

Conducting risk analyses

Implementing administrative safeguards

Building physical safeguards

Installing technical safeguards

Documenting Policies & Procedures

What Is A Security Breach?

Security breaches - occur when unauthorized persons gain access to P.P.I./P.H.I. by:

- Stealing computers and/or computing files
- Overhearing conversations about clients
- Dumpster diving for medical and payment records
- Reading documents left on unattended desks or copy machines
- Extracting data from the hard drives of discarded copy machines
- Any other means

HIPAA: SHIP & SMP Operations

- Covered entities, including health care providers, can't disclose an individual's P.H.I. without written consent or the individual's presence and oral consent
 - Use consent forms to document authorization (RI SHIP Release Form)
 - Make 3-way calls with provider and client on the line
- Customer service representatives at 1-800-MEDICARE can't discuss a client's P.H.I. with third parties
 - Must use the SHIP Unique ID to conduct SHIP work
 - Privacy training required
- Electronic transmissions containing P.H.I. must be secure
 - Use email encryption
- HIPAA Security Rule is model for VRPM Information Technology (IT) policies

VRPM Confidentiality Policy

What is the policy for protecting client confidentiality?

Policy 3.94

SHIP & SMP volunteers are responsible for maintaining the confidentiality of all proprietary or privileged information to which they are exposed while serving as a volunteer, whether this information involves a member of staff, a volunteer, a beneficiary or other person, or involves the overall business of the SHIP.

VRPM Confidentiality Policy, Cont.

How does Policy 3.94 affect SHIP & SMP operations?

Volunteers are to be trained on confidentiality before they get a CMS Unique ID

Volunteers are to sign a written confidentiality agreement

The agreement informs volunteers that a confidentiality breach is grounds for immediate dismissal

Participation in SHIP & SMP is conditioned on full compliance with the agreement.

Confidentiality Best Practices

Volunteers take steps needed to safeguard beneficiary related information and prevent unauthorized persons from accessing P.P.I./P.H.I.

Use private spaces in meetings with clients to ensure confidentiality

Use computer screen covers to block P.P.I./P.H.I. from unauthorized viewers

Limit information sharing to minimum needed to assist, train, or report

Store documents containing P.H.I. in locked offices or filing cabinets

Return original documents containing P.P.I./P.H.I. to clients and make copies when necessary

Follow protocols to destroy documents containing P.P.I./P.H.I.

VRPM IT Policies

Volunteers are to comply with Information Technology (IT) procedures or protocols for:

Controlling access to and use of beneficiary information

Safe operation of computers used to collect and store program and beneficiary information

Using the Internet, including e-mail use and appropriate access to web sites

Using wireless devices to connect to the Internet while performing SHIP or work

Using their personal computers while performing SHIP or SMP work.

VRPM IT Policy Best Practices: Don't

Don't send or forward e-mails with P.P.I. to personal e-mail accounts (e.g., Yahoo, Gmail)

Don't upload PPI to unauthorized websites (e.g., wikis)

Don't use unauthorized mobile devices to access P.P.I.

VRPM IT Policy Best Practices: Do

Do store PPI in a password protected file on a password-protected computer to which only authorized persons have access.

Do clear your web browser history to avoid other users accessing PPI.

Do report lost or stolen client information to your supervisor.

Do use strong passwords, ideally “pass phrases,” for email accounts.

Do lock your computer anytime you step away to avoid the chance that an unauthorized individual will access it.

Do lock up portable devices (e.g., laptops, cell phones).

Best Practice: Strong Passwords

Special character (s):
(%, ^, *, ?, <, >)

A random combination of 8 or more numbers

Capital and lower-case letters

Pass Phrase:
Example: “I Like To Sing and Take Long Walks” = 1L2\$&Tlw.

Using different character types makes it harder for intruders to crack the password.

Password Don'ts

Create easy-to-remember passwords.

Use obvious passwords related to common information such as child's or pet's name, or your favorite sports team.

Use passwords that someone can guess, using your social media information.

Write down your password in a place that is accessible to others.

Share your passwords.

Best Practice: Wi-Fi Networks

Wi-Fi Networks

Malicious actors could be lurking in the free Wi-Fi networks that you might use at your local coffee shop or while traveling.

Tips on the secure use of Wi-Fi

Use secured Wi-Fi networks such as your home Wi-Fi or Hotspot devices (mobile phone/tablet). Do not access or transmit P.P.I. when using an unsecured Wi-Fi connection.

Resources

-HHS Health Information Privacy Website

- www.hhs.gov/hipaa/index.html

-SHIP Resource Library: STARS Security Slick Sheet

-SHIP and SMP resource libraries:

- VRPM Policies and Procedures
- VRPM Information Technology Resources
- Unique ID resources (job aids, confidentiality agreements, etc.)

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thank you!

QUESTIONS?

Client Confidentiality Agreement / Release of Information Form

State Health Insurance Assistance Program (SHIP) is a federal program and is sponsored by the State of Rhode Island Department of Human Services, Office of Healthy Aging (OHA), designed to provide education and assistance to Medicare-eligible individuals, their families and caregivers to assist in making informed health insurance decisions. Services are provided by trained counselors and volunteers who are not actively affiliated with the insurance, financial planning or pharmaceutical industries.

SHIP Counselors and Volunteers DO:

- Provide one-on-one counseling regarding Medicare options in efforts to empower the consumer to be informed of viable choices; exercise his/her individual rights and protections; and become a pro-active partner in his/her own health care decisions.
- Upon request, assist with applications and enrollment in Medicare prescription drug plans, health plans and assistance programs.
- Assist with Medicare health insurance problems.
- Keep all consumer information confidential.

SHIP Counselors and Volunteers DO NOT:

- Charge the consumer or accept any compensation for their services
- Provide legal advice or advise you on the purchase, renewal or termination of specific insurance products.
- Sell, recommend or endorse any specific insurance product, agent, company, Medicare Health Plan, or Prescription Drug Plan

SHIP Counselors assume no responsibility for decisions made by, advice given to, or actions taken by the consumer and the client agrees to waive any and all claims they may have against and hold harmless the State of Rhode Island SHIP and the counselors or their affiliated agency for any liability arising out of services provided. Any information provided by the client during the process must be complete, truthful, and accurate. The consumer may wish to speak with a fiduciary or other person of trust and consult with other resources prior to deciding.

SHIP Counselors will use information collected from the consumer only in pursuit of assisting the consumer and will not disclose confidential information to external sources other than the Social Security Administration (SSA), the Centers for Medicare & Medicaid Services (CMS), other RI SHIP staff, service providers, insurance carriers or others solely in conjunction with SHIP counseling or assistance duties.

Should you have any complaints or suggestions for making RI SHIP more responsive to your needs, please let us know by calling the State SHIP Line at 1-888-884-8721. OHA may contact you later to assess your satisfaction with the service provided by the RI SHIP program.

Client Confidentiality Agreement / Release of Information Form

I hereby authorize to obtain from or release information pertinent to me for the purpose of providing SHIP counseling, assistance and, if necessary, enrollment assistance in to Medicare programs and Medicare assistance programs.

CLIENT NAME: _____ DATE: _____

CLIENT SIGNATURE: _____

SHIP COUNSELOR NAME: _____ DATE: _____

SHIP COUNSELOR SIGNATURE: _____

SHIP COUNSELOR AGENCY: _____ COUNSELOR PHONE #: _____

Acuerdo de Confidencialidad del Cliente / Formulario de Divulgación de Información

El Programa Estatal de Asistencia con el Seguro de Salud (SHIP) es un programa federal y está patrocinado por el Departamento de Servicios Humanos del Estado de Rhode Island, y también a través de la Oficina de Envejecimiento Saludable (OHA). Este programa está creado para proporcionar educación y asistencia a las personas elegibles para el Medicare, sus familiares y cuidadores, ayudándoles a tomar decisiones informadas sobre el seguro de salud. Los servicios son proporcionados por asesores y voluntarios capacitados que no están afiliados activamente a las industrias de seguros, planificación financiera, o farmacéutica.

Los Consejeros y Voluntarios del Programa SHIP, HACEN lo siguiente:

- Brindan asesoramiento individual sobre las opciones de Medicare en un esfuerzo por capacitar al consumidor para estar informado de las diferentes opciones viables; ejercer sus derechos y protecciones individuales; y convertirse en un socio proactivo en sus propias decisiones de atención médica.
- A pedido de usted, le asisten con solicitudes e inscripciones en planes de medicamentos recetados, planes de salud y programas de asistencia de Medicare.
- Le ayudan con los problemas de seguro de salud de Medicare.
- Mantienen toda la información del consumidor confidencial.

Los Consejeros y Voluntarios de SHIP, NO PUEDEN hacer lo siguiente:

- Cobrar al consumidor o aceptar cualquier compensación por sus servicios.
- Brindar asesoramiento legal o asesorarlo en la compra, renovación o finalización de productos de seguros específicos.
- Vender, recomendar o respaldar cualquier producto de seguro específico, agente, compañía, plan de salud de Medicare o plan de medicamentos recetados.

Los asesores de SHIP no asumen ninguna responsabilidad por las decisiones tomadas, los consejos o acciones tomadas por el consumidor y el cliente acuerda renunciar a todas y cada una de las reclamaciones que puedan tener y eximir de responsabilidad al programa de SHIP del Estado de Rhode Island y los asesores, o su agencias afiliadas por cualquier responsabilidad derivada de los servicios prestados. Cualquier información proporcionada por el cliente durante el proceso debe ser completa, veraz y precisa. Es posible que el consumidor desee hablar con un fiduciario u otra persona de confianza y consultar con otros recursos antes de decidir.

Los asesores de SHIP utilizarán la información recopilada del consumidor solo para ayudar al consumidor y no divulgarán información confidencial a fuentes externas que no sean la Administración del Seguro Social (SSA), los Centros de Servicios de Medicare y Medicaid (CMS), otro personal de RI SHIP, proveedores de servicios, compañías de seguros u otros únicamente en conjunto con las tareas de asesoramiento o asistencia de SHIP.

Si tiene alguna queja o sugerencia para hacer que el programa de RI SHIP responda mejor a sus necesidades, infórmenos llamando a la línea estatal de SHIP, al 1-888-884-8721. La Oficina de Envejecimiento Saludable (OHA) puede contactarlo más tarde para evaluar su satisfacción con el servicio proporcionado por el programa RI SHIP.

Acuerdo de confidencialidad del cliente / Formulario de divulgación de información

Por la presente, autorizo a obtener o divulgar información pertinente para mí con el fin de proporcionar asesoramiento, asistencia y, si es necesario, asistencia de SHIP para la inscripción en los programas de Medicare y los programas de asistencia de Medicare.

NOMBRE DEL CLIENTE: _____ FECHA: _____

FIRMA DEL CLIENTE: _____

NOMBRE DEL CONSEJERO SHIP: _____ FECHA: _____

FIRMA DEL CONSEJERO SHIP: _____

NOMBRE DE LA AGENCIA SHIP: _____ TELÉFONO DEL CONSEJERO #: _____

RI OHA Tips for Affordable Prescriptions

Many Medicare beneficiaries may find themselves at the pharmacy counter with a prescription their Medicare Part D insurer will suddenly not cover. If this happens to you, here are some steps you can take to make your drugs affordable.

Consult Your Pharmacy

- **Make sure the pharmacy has your up-to-date insurance information:**
 - A claim can be denied simply because the pharmacy computer system has outdated or incorrect insurance information for you.
 - If you use more than one pharmacy, there may be a duplicate prescription already in the system. This can happen when you're transferring prescriptions from one pharmacy to another, sometimes causing a claim denial.
 - Make sure that any drug discount coupons (e.g., *GoodRX*) that you have used in the past, are deleted from the computer system, as this could also lead to a claim denial.
- **Confirm the pharmacy is in your Medicare Part D Plan or Advantage Plan Network:**
 - Most Medicare Part D and Advantage Plans encourage you to utilize a specific network of pharmacies to fill your prescriptions. If you go outside of that network, your plan may require you to pay more. **Note that an insurer's list of in-network pharmacies can change at the beginning of each year, so remember to check your plan every year for their list of in-network pharmacies.**
- **See whether you must use mail order:**
 - According to the *Pharmacy Benefit Management Institute*, about 25% of plans require you to fill certain prescriptions through mail-order pharmacies. If the price of your prescription suddenly increased, or is no longer covered, check to see whether coverage would be better through mail order.
- **Look into whether you can get your preferred drug at a better price without your insurance:**
 - Websites such as *Blink Health*, *GoodRX*, and *RxSaver* are helpful resources for discount coupons.
 - If you can't find a coupon, ask the pharmacist what their lowest cash price is. Independent pharmacies have more leeway than bigger chains to negotiate prices.

What if Your Plan Won't Cover a Particular Drug?

If your network pharmacy cannot fill a prescription, the pharmacist will provide you with a notice called "Medicare Prescription Drug Coverage and Your Rights." This notice explains how you can contact your Medicare drug plan and request to have the prescription filled. If the pharmacist doesn't show you this notice, ask to see it.

- **You have the right to do all of these (even before you buy a certain drug):**
 - Talk to your doctor about the following:
 - Whether your plan has special coverage rules
 - Whether there are generic, over the counter, or less expensive brand-name drugs that could work as well as the ones you are taking now.
- **Get a written explanation (called a "Coverage Determination") from your Medicare drug plan. A Coverage Determination is the first decision made by your Medicare drug plan (not the pharmacy) about your benefits , including:**
 - Whether a certain drug is covered
 - Whether you have met the requirements to receive a requested drug
 - How much you pay for a drug
 - Whether to make an *exception to a plan rule when you request it
- **Ask for an *exception if:**
 - You or your prescriber believes that you need a drug that is not on your plan's formulary (covered drugs specific to your Plan).
 - You or your prescriber believes that a coverage rule (like prior authorization) should be waived.
 - You think you should pay less for a higher tier (more expensive) drug because you or your prescriber believes you cannot take any of the lower tier (less expensive) drugs for the same condition.
 - You disagree with your plan's "at-risk determination" under a drug management program that limits your access to coverage for frequently abused drugs.
- **Appeal Process:**
 - Ask your prescriber to help if a needed drug is not on your Plan's formulary. Your prescriber can establish the medical need and ensure that key health information, (such as your diagnosis), other treatment tried, why it was stopped, etc.
 - Have your prescriber request an expedited review if you need an answer within 72 hours.
 - Your Medicare drug plan will send you a written decision. If you disagree with this decision, you have the right to appeal. The appeals process has 5 levels. If you disagree with the decision made

at any level of the process, you can usually appeal to the next level. At each level, you will receive instructions in the decision letter on how to move to the next level of appeal.

Need Further Assistance to ensure you are in the best Medicare Part D Plan?

- Contact the Rhode Island State Health Insurance Assistance Programs (RI SHIP). RI SHIP provides no-cost, local, in-depth, and objective insurance counseling and assistance to Medicare-eligible individuals, their families, and caregivers.
 - **RI SHIP Locations:**
 - **Providence:** United Way of RI; dial 2-1-1
 - **Tri-County CAP of Northern RI:** (401) 349-5760 x2635
 - **West Bay Community Action Agency:** (401) 921-5118
 - **Tri-County CAP of South County:** (401) 789-3016 x2379
 - **East Bay Community Action Agency:** (401) 435-7876
 - **Child & Family Services of Newport County:** (401) 848-4185
 - **RI SHIP Main Line:** 1-800-884-8721
 - **Statewide:** (401)-462-4444 (The POINT)

Sources:

<https://www.medicare.gov/medicare-prescription-drug-coverage-appeals>

Gill, Lisa. "When Your Insurer Drops Your Drugs." Consumer Reports. August 2020.

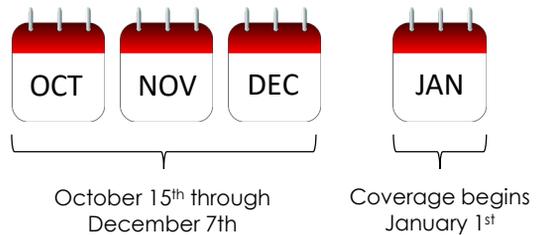
SHIPs nationally are funded in part by the U.S. Administration for Community Living (ACL), U.S. Department of Health and Human Services (DHHS). This brochure was produced by the SHIP National Technical Assistance Center and supported by grant number 90SATC0001 from ACL

Medicare Open Enrollment

What is Medicare Open Enrollment?

Medicare Open Enrollment is the time during which Medicare beneficiaries can reevaluate their coverage – whether it's Original Medicare with supplemental coverage, Medicare Advantage, or other available options – and make changes if they want to do so.

When is the Open Enrollment Period?



Can someone help me in my community?

Yes! The Rhode Island State Health Insurance Assistance Program (SHIP) helps Medicare beneficiaries find the right Medicare coverage at the right cost. The Office of Healthy Aging also educates Medicare beneficiaries on how to prevent, detect, and report Medicare fraud, waste, and abuse via the Senior Medicare Patrol (SMP) program. To connect with a SHIP Counselor in your community, call:

Tri-County Community Action – North: 349-5760
Tri-County Community Action – South: 789-3016 x 3
Child & Family Services Newport County: 848-4185

Westbay Community Action: 921-5118
United Way of Rhode Island: 519-0360
East Bay Community Action: 435-7876

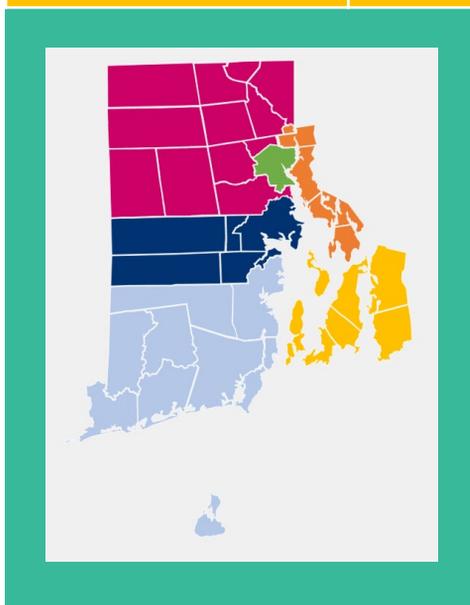
Need more information? That's the **Point**. Call 401.462.4444.

Call the Point, your healthy aging help desk, to talk with a specialist today and get connected to resources in your area – for free. Explore options for healthcare, employment, and more. The Point also provides conflict-free, unbiased Medicare counseling year-round and during Medicare Open Enrollment.



Point network partners are in your community

Tri-County Community Action Agency - North	Cranston, Scituate, Cumberland, Johnston, Lincoln, North Providence, Burrillville, Foster, Glocester, North Smithfield, Smithfield, Woonsocket	401-349-5760
Westbay Community Action Agency	Coventry, West Greenwich, East Greenwich, Warwick, and West Warwick	401-921-5118
Tri-County Community Action Agency – South	Charlestown, Exeter, Hopkinton, New Shoreham, Richmond, North Kingstown, South Kingstown, Narragansett, and Westerly	401-789-3016 ext. 3
United Way of Rhode Island	Providence	401-519-0360
East Bay Community Action Agency	Bristol, Barrington, East Providence, Warren, Pawtucket, and Central Falls	401-435-7876
Child & Family Services of Newport County	Newport, Middletown, Portsmouth, Tiverton, Jamestown, and Little Compton	401-848-4185



Rhode Island's healthy aging help desk can be reached 24/7 by calling **401-462-4444**





We would be lost without this program. We wouldn't know where to go to receive help for Medicare issues. – Marie Vargas



It's going to save you money and it's going to help you pick the right program for you. – Tracey Stewart

If this service were not available I think that I would have been in worse shape than I am now. – Francine Dent



They make it very easy and simplify the whole process. – Gary Bartle

Before the help that I received here, it was like I was just a ball being thrown around. – Betty Jerry



I was not too adept at navigating the government website, but I had seen SHIP offering this service and I thought, "I think that's the way to go." – Eloise Dennis



FOR MORE INFORMATION ABOUT STATE HEALTH INSURANCE ASSISTANCE PROGRAMS (SHIP) NATIONALLY, VISIT www.shiptacenter.org

SHIPs nationally are funded in part by the U.S. Administration for Community Living (ACL), U.S. Department of Health and Human Services (DHHS). This brochure was produced by the SHIP National Technical Assistance Center and supported by grant number 90SAPG0073-01-00 from ACL.

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R.I. Regional SHIP Offices:

Providence: dial 2-1-1 or 462-4444 (POINT)
Northern RI: (401) 349-5760
West Bay: (401) 921-5118
South County: (401) 789-3016 x 3
East Bay: (401) 435-7876
Newport County: (401) 848-4185

The R.I. Office of Healthy Aging is the RI grantee for the National Network of SHIPs

<http://www.oha.ri.gov/ship>



RI SHIP - 1-800-884-8721
POINT - (401) 462-4444



Local Medicare Help

Trusted, unbiased, one-on-one counseling and assistance



The national SHIP mission is to empower, educate, and assist Medicare-eligible individuals, their families, and caregivers through objective outreach, counseling, and training to make informed health insurance decisions that optimize access to care and benefits.



Coverage Changes

Considering making coverage changes during Medicare's Open Enrollment Period? Contact your SHIP for one-on-one assistance with reviewing health or prescription drug plan options.

Enrollment

Unsure about Medicare's enrollment and eligibility criteria? Your SHIP will help you understand the guidelines.

Who Pays First

Confused about who pays first, Medicare or another insurance? Your SHIP can explain how Medicare works with supplemental policies, retiree coverage, Medicaid, and other kinds of insurance.

What's Covered

Wondering what Medicare does and doesn't cover? Navigating Medicare can be complicated. Your SHIP has answers.

Costs

Worried about the out-of-pocket costs associated with Medicare? Contact your SHIP to find out about assistance programs for which you or your loved one might be eligible.

Appeals

Uncertain of your Medicare rights or the Medicare rights of your loved ones? Contact your SHIP for assistance.

Medicare loses an estimated \$60 billion each year due to fraud, errors, and abuse. Every day, these issues affect countless beneficiaries nationwide.

HOW DOES HEALTH CARE FRAUD HAPPEN?

A “representative” calls offering an incentive—perhaps a free back or knee brace. All he needs is your Medicare number. It may seem harmless at first, but this is attempted fraud and it could lead to identity theft.

Don't accept medical equipment or supplies unless they are ordered by your doctor. Never share your Medicare number with a stranger who calls to ask for it.

PROTECTING YOU & MEDICARE

The good news is that by following some simple tips, you can protect yourself against these types of scams. Remembering to **protect**, **detect**, and **report** helps everyone, including you and your loved ones.



The Senior Medicare Patrol (SMP) is a national program for people with Medicare of all ages. SMP is administered by the Administration for Community Living. To learn more or to volunteer, visit www.smpresource.org.



Part of the U.S. Department of Health and Human Services.



Protect Yourself & Medicare

Rhode Island SMP

401-462-0194

www.oha.ri.gov/programs/SMP



PROTECT

Protect yourself against Medicare fraud.

Protecting your personal information is your best defense against health care fraud and abuse.

Steps to protect yourself and your health care benefits:

- Treat your Medicare and Social Security numbers like your credit cards. Never give these numbers to a stranger.
- Remember, Medicare won't call to ask for your Medicare number.
- Don't carry your Medicare card unless you'll need it for a doctor's appointment.
- Keep a record of your medical visits, tests, and procedures in a health care journal or calendar.
- Save your Medicare statements, such as Medicare Summary Notices and Explanations of Benefits.

DETECT

Detect potential fraud, errors, and abuse.

Knowing how to spot suspicious activity can help you stop health care fraud and abuse in its tracks.

Steps to detect possible fraud, errors, and abuse:

- Review your Medicare statements for mistakes by comparing them to your personal records.
- Look for three things on your Medicare statements:
 - Charges for something you didn't get
 - Billing for the same services or supplies twice
 - Services that weren't ordered by your doctor





Empowering Seniors To Prevent Health Care Fraud

La Patrulla de Medicare para Personas Mayores (SMP, por sus siglas en inglés) es un programa nacional para personas de todas las edades que tienen Medicare. La Administración de Vida Comunitaria administra la SMP. Para obtener más información o trabajar como voluntario/a, visite www.smpresource.org.



Parte del Departamento de Salud y Servicios Humanos de EE. UU.



Protéjase a sí mismo y a Medicare

Rhode Island SMP

401-462-0194

www.oha.ri.gov/programs/SMP



Medicare pierde aproximadamente \$60 mil millones de dólares cada año debido a fraudes, errores y abusos. Cada día, estos problemas afectan a un sinnúmero de beneficiarios en todo el país.

¿CÓMO OCURRE EL FRAUDE EN LA ATENCIÓN DE SALUD?

Un "representante" llama para ofrecer un incentivo, tal vez un soporte para la espalda o la rodilla. Todo lo que necesita esta persona es su número de Medicare. En un principio, esto podría parecer inofensivo, pero es un intento de fraude y podría llevar a un robo de identidad.

No acepte equipo ni suministros médicos a menos que su médico los pida. Nunca comparta su número de Medicare con un desconocido que llame para pedirselo.

CÓMO PROTEGERSE A SÍ MISMO/A Y A MEDICARE

La buena noticia es que, al seguir algunos de los siguientes consejos sencillos, usted puede protegerse a sí mismo/a en contra de este tipo de estafa. Recuerde que **proteger, detectar y reportar**, es algo que ayuda a todos, incluyéndolos a usted y a sus seres queridos.

PROTEGER



Protéjase a sí mismo/a del fraude en contra de Medicare.

Proteger su información personal es su mejor defensa en contra del fraude y del abuso en la atención de salud.

Pasos para protegerse a sí mismo/a y a sus beneficios de atención de salud:

- Trate a sus números de Medicare y del Seguro Social como si fueran un número de tarjeta de crédito. Nunca comparta estos números con un desconocido.
- Recuerde que Medicare no llamará para pedirle su número de Medicare.
- No lleve consigo su tarjeta de Medicare a menos que la necesite para una cita médica.
- Mantenga un registro de sus consultas, pruebas y procedimientos médicos en un diario o calendario de atención de salud.
- Guarde sus estados de cuenta de Medicare, como sus Avisos de Resumen de Medicare y las Explicaciones de Beneficios.

DETECTAR



Detecte fraudes, errores y abusos potenciales.

Saber cómo identificar la actividad sospechosa puede ayudarle a detener el fraude y el abuso relacionado con la atención de salud.

Pasos para detectar fraudes, errores y abusos potenciales:

- Revise sus estados de cuenta de Medicare para encontrar errores al compararlos con sus registros personales.
- Busque tres cosas en sus estados de cuenta de Medicare:
 - Cargos por algo que usted no se realizó
 - Facturación doble por los mismos servicios o suministros
 - Servicios que su médico no ordenó



REPORTAR



Reporte los presuntos fraudes, errores o abusos.

Si sospecha que ha sido víctima de fraude, repórtelo. Esto le ayudará a usted y a otras personas que están en riesgo de sufrir estafas de atención de salud.

Pasos para reportar los comportamientos sospechosos:

- Si recibe una llamada sospechosa, no comparta ninguna información personal. Reporte la llamada de inmediato a su SMP local.
- Si tiene preguntas sobre sus estados de cuenta de Medicare, llame a su proveedor o plan de atención de salud.
- Si no se siente cómodo/a llamando a su proveedor de salud o si no está satisfecho/a con la respuesta, llame a su SMP local. Todas las conversaciones son confidenciales.