SMP Volunteer Roles

Counselor

Purpose –

To empower and assist Medicare beneficiaries and their caregivers to prevent, detect and report health care fraud, error and abuse by educating them in individual counseling sessions.

Volunteer Activities –

SMP counselors discuss individual situations with beneficiaries and/or caregivers and may review Medicare Summary Notices (MSN), billing statements, medical records, and other related financial and health documents. Counselors also educate beneficiaries about how to prevent, detect, and report Medicare fraud, error, and abuse. Counselors listen carefully to the beneficiary’s or caregiver’s account of a situation and determine whether to:

- Share information with, or provide an explanation to, the beneficiary or caregiver,
- Send the beneficiary or caregiver to an SMP staff person or volunteer who handles complex issues, or
- Send the beneficiary to another more applicable organization for assistance (such as CHOICES)

When the SMP counselor decides to refer a beneficiary’s case to a staff person or volunteer who handles complex issues, the counselor may receive and confidentially transmit the beneficiary’s documents to that person with the SMP’s confidentiality and data security procedures in mind. Counselors provide their services in person or by telephone. Counseling may take place at various locations including but not limited to seniors centers, SMP or Medicare education events, and libraries.

Presenter

Purpose –

To empower and assist Medicare beneficiaries and their caregivers to prevent, detect and report health care fraud, error and abuse by educating them on SMP topics through substantive presentations to groups in the community.
Volunteer Activities -

Make presentations using SMP-approved materials and scripts to audiences that consist of Medicare beneficiaries, their caregivers and/or other members of the public who want to gain awareness of the SMP program and the national effort to prevent, detect and report fraud, error and abuse in the health care system. Group presentations also include an opportunity for questions and answers with the audience about covered topics and information. Examples of where these presentations occur may include but are not limited to:

- Senior centers and community centers
- Health fairs and senior fairs
- Medicare education events
- Meetings of civic or faith-based organizations
- Meetings of health care providers
- Meetings of local law enforcement officials
- Libraries
- Universities and colleges

Administration

Purpose -

To provide administrative support to the work of SMP paid and volunteer staff in their mission to empower Medicare beneficiaries and their caregivers to identify billing mistakes and prevent and detect health care fraud, error and abuse.

Volunteer Activities -

SMP volunteers who assist with administration handle tasks such as copying, general filing, and making outbound phone calls in support of SMP activities, for example, locate and reserve training space, confirm participant attendance, etc. Volunteers who assist with administration may perform other tasks as mutually agreed, including:

- Word processing
- Data entry
- Scheduling presentations and other outreach activities
- Collating
- Internet searches
- Fulfilling requests for information and materials
• Handling mail and correspondence

**Outreach Volunteer**

**Purpose** -

To empower and assist Medicare beneficiaries and their caregivers to prevent, detect and report health care fraud, error and abuse by disseminating SMP information to sites and events throughout the community and/or presenting prepared copy or scripted activities for outreach.

**Volunteer Activities** -

Provide general information about the SMP and health care fraud, error and abuse at events and through the dissemination of SMP hard copy education and information materials by:

- Transporting materials and supplies to community events (i.e. senior fairs)
- Distributing written information about the SMP program and its services to locations including but not limited to residential facilities, senior centers, health care providers, libraries and agencies serving Medicare and Medicaid beneficiaries and their caregivers
- Distributing written information about preventing and identifying health care fraud, error and abuse
- Answering general questions about the SMP program and its services
- Responding to simple inquiries

**Complex Issues Examiner**

**Purpose** -

Volunteers who handle complex issues assist Medicare beneficiaries in reporting specific instances of suspected health care fraud, error and abuse. They help beneficiaries distinguish error from potential fraud or abuse and, as a result of their research, may act on a beneficiary’s behalf to correct an error or refer suspected fraud and abuse to the appropriate authorities. Because SMPs work closely together in a unique relationship with Medicare and Medicare fraud and abuse investigators, they have
the ability to provide individual assistance and expedited referrals when beneficiaries report suspected fraud, error and abuse. Through this relationship, volunteers who handle complex issues respond to beneficiary concerns about health care fraud.

**Volunteer Activities -**

Volunteers who handle complex issues respond to beneficiary and caregiver inquiries that involve complaints of fraud, error, and abuse by:

- Interviewing the beneficiary and/or caregiver in person or by telephone
- Obtaining detailed information related to the report of fraud, error, or abuse
- Gathering information and documentation about the case, such as Medicare Summary Notices (MSN), Explanation of Benefit (EOB) records, billing statements, other financial records that contain confidential personal identifying information, or legal documentation related to the complaint
- Reviewing and evaluating information and documentation about the case
- Researching issues using SMP Manuals and other Medicare program integrity resources
- Entering the report of suspected fraud, error, or abuse into the SMART FACTS reporting and referral system
- Assessing the case for further investigation and/or referral
- Referring the case to the appropriate government entity for investigation
- Supporting and following up with beneficiaries as their reported issue moves through the research and resolution process