THE NATIONAL CONSUMER PROTECTION TECHNICAL RESOURCE CENTER

THE SENTINEL

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2008 National Consumer Protection Week

FinancialLiteracy
a Sound Investment
National Consumer Protection Week
March 2-8, 2008

Federal, state, and local government agencies and national consumer advocacy organizations join together to launch the 10th annual National Consumer Protection Week (NCPW) March 2nd – 8th. NCPW highlights consumer education efforts in the fight against fraud in communities across the nation. NCPW organizers are encouraging people from coast to coast to focus on the financial facts of life. Financially savvy consumers are likely to make smarter decisions about managing their money and less likely to be victims of fraud. Although fraud victimization occurs across all age ranges, special attention should be paid to the population most likely to become victims and in need of a great deal of protection.

Protecting a Vulnerable Population

Scientific evidence has proven what many swindlers already knew as they preyed upon a very vulnerable population. Last month, researchers reported that some elderly adults may be more susceptible to fraud due to changes in the brain that affect judgment and decision-making. Said Natalie Denburg, a neuroscientist at the University of Iowa, "Our research suggests that elders who fall prey to fraudulent advertising are not simply gullible, depressed, lonely or less intelligent. Rather, it is truly more of a medical or neurological problem." This development reinforces the need of the SMPs work and demonstrates the importance of getting its fraud message out.

SMPs understand the importance of educating Medicare and Medicaid beneficiaries as a first line of defense. Persistence and consistency in sharing the SMP message is very important in empowering seniors to prevent healthcare, as well as consumer, fraud.

Your Message is Important

There are many ways in which you can be a part of this year's National Consumer Protection Week! SMPs are strongly encouraged to participate in this national effort to impress upon consumers—especially older Americans— the message of the

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SMP program. During this week you can share your message and get the word out about your program by distributing a:

* press release—send the release to reporters from your local newspapers and TV station or to their News Desk if you don't have a contact name.
* letter to the editor—send the letter to the editor of your local newspaper to express your support for consumer protection and highlight the importance of being an informed consumer.
* radio public service announcement—contact the PSA Director at you local stations and ask them if their on-air personalities could record and play a service announcement about your program and efforts to prevent fraud. Also, offer to do an interview for their news segment or community affairs programs.

What's going on in West Virginia and in your state?
We know that a number of SMPs are busy spreading the word about their programs and participating in, and even holding, local events. If you would like to share a story about your consumer protection events please email cgriffin@ahqa.org. In the next edition of The Sentinel, we will be featuring a story about the W.V. SMP. Linda Bunn will be sharing the consumer protection events held in her state.

AoA Update: 2008 SMP Regional Conference

It is with much excitement that I announce to the SMP community that AoA has approved, and is in the process of planning, the 2008 SMP Regional Conferences!

A committee consisting of Center staff and SMP stakeholders, including SMP Project Directors and AoA Project Officers, have been working very hard to plan a great agenda for the upcoming conferences. Although the actual dates are tentative, we are expecting that the regional conferences will occur as follows:
Regions 1 – 4 Conference in Orlando, FL the week of September 21st
Regions 5 – 7 Conference in Houston, TX the week of August 17th
Regions 8 – 10 Conference in the Los Angeles/Orange County area the week of September 7th

In order to ensure that SMPs have adequate time to make travel plans we are working diligently to confirm the actual dates of the conferences. More details will be made available in the coming weeks!

If you should have questions or suggestions for the conference, please feel free to contact me or Candice Griffin at cgriffin@ahqa.org.

We are planning to make sure this is one of the best conferences ever! We certainly look forward to seeing you all in August or September but will follow up with additional information in the months ahead!

Barbara Dieker
Director, Office of Elder Rights, AoA

Strategic Partnerships are a Key Priority of the Center

Entering into "partnerships" is certainly the rage these days. It would be an interesting exercise in any given work week in human services (or likely in any field) to count the number of times the word "partnership" comes up. Its constant use risks the possibility of rendering trite the notion of "partnerships" between organizations or programs. Yet, partnerships ought to be a constant in human services. After all, partnership is really a form of "relationship." And good relationships seem crucial to success in the delivery of human services.

What arguably may trivialize the notion of "partnerships" are relationships that aren't really partnerships; that is, arrangements in which each party brings to the relationship their particular contributions to the pursuit of a common or mutual purpose. In short, it's not enough for organizations or individuals to simply declare "we are partners" and therefore have a partnership. To have meaning, the declaration of partnering ought to be accompanied by bringing something of value "to the table" with the other party or parties at the "partnership" table. Wikipedia suggests defining "partnering" as "a structured process that brings the stakeholders together to align stakeholder objectives, to focus resources on resolving key tangible issues that are affecting performance, to escalate issues and to measure performance of the project." (Dombkins, D. 1998).

The November 2007 edition of The Sentinel featured Anne Fredrickson, Director of the Ohio SMP program (Pro-Seniors, Inc.), and her success in establishing partnerships, including with the Ohio SHIP. As noted in the story, Anne gives presentations for SHIP on health care fraud and, as Anne notes, "In return, the SHIP provides trainers for SMP volunteer trainings to educate about the SHIP program and Medicare." In this relationship between the Ohio SMP and the Ohio SHIP, the two parties bring specific contributions to their partnership; there is a clear quid pro quo between the two.

Establishing and maintaining strategic partnerships with national organizations in support of the SMP network is a major goal of the National Consumer Protection Resource Center (The Center). The partnerships sought by the Center will be those that bring value to the SMP network and "in return" provide value to the other parties to each partnership. In particular, the Center will seek partnerships that help to build national visibility for the SMP program and that help to fulfill the Center's mission to provide consumers with information about health care errors, fraud and abuse. Moreover, priority partnerships will be those that promise to provide the greatest "bang for the buck" in terms of effort spent in building, refining and sustaining strategic partnerships.

The Center is currently developing a "partnership template" to help identify the most important factors to be considered in identifying priority partnership opportunities. Factors under consideration for this "template" include, among others, relevance to fraud and abuse; relevance to Medicare, Medicaid and other health programs; capacity to expand visibility among and education of consumers, providers, and the aging network; and having the potential for reaching large pools of potential volunteers. The Center will look to the SMP network to help identify the most significant potential partner organizations.

Subsequent editions of The Sentinel will provide more information about the Center's partnership development efforts. Feedback is welcome at any time. Please direct any comments about partnership development to Bill Benson at the Center.

Partnership in Vermont

The Vermont SMP is housed by the Community of Vermont Elders (COVE), an advocacy organization that strives to promote and protect quality of life for Vermont's seniors. SMP Director Anita Hoy has found that this relationship has provided many opportunities for collaboration within Vermont's long term care and advocacy fields. She has also developed a number of additional exciting partnerships during her time with the program. Most recently, the SMP has begun to partner with her state's Medicaid program. Anita described her greatest hurdle as a general lack of enthusiasm for volunteer usage in Medicaid. In her efforts to develop this partnership, she confronted challenges associated with perceived lack of need, issues of privacy, concerns related to supervision and program complexity with regards to the inclusion of potential volunteers. Anita officially represents COVE and SMP at the monthly Medicaid Advisory Board meetings and is able to provide input to that board, as well as meet new members of the Medicaid community. Anita also serves on Vermont's MMA Legislative Outreach and Education Task Force. In addition, this year she has participated in the Vermont Campaign for Health Care Security, along with other educators and advocates. Anita notes that participation in these groups has broadened the exposure of Vermont SMP, as well as facilitated personal and programmatic relationships with other key stakeholders.

Recently, the Medicaid Fraud Control Unit of the Office of Vermont Health Access (OVHA) hired a new director who is focused on integrity issues. In September 2007, Anita met with the Vermont Department of Disability, Aging and Independent Living (DAIL) and Vermont Office of Health Access (OVHA/Medicaid) and the Office of the Attorney General (AG) to discuss mutual needs and strategies for collaboration. During this meeting, the partners identified barriers and concerns, but also brainstormed ideas for effectively incorporating volunteers based on organizational needs and opportunities.

Vermont SMP has a relationship with the state's Medicaid Fraud and Residential Abuse Unit, within the Office of the Attorney General (AG), supported by a written Memorandum of Understanding. The partners have identified two collaborative volunteer training projects, one with a training video and one on senior exploitation. The AG developed a training video titled "When Healing Hands Harm," which depicts various ways that that drug addicted caregivers divert and steal prescription drugs from beneficiaries. The SMP project's volunteers will be trained by the AG and SMP to present this video to home health agencies, hospitals, nursing homes, senior centers and gatherings of families and caregivers. SMP will also work closely with the Vermont Association of Professional Care Providers (VAPCP) to recruit caregivers as volunteer trainers. These professional direct care workers are committed to upholding ethical standards in their field, including preventing and detecting fraud and abuse. Vermont SMP will also recruit regional Substance Abuse Prevention Consultants, employed by the Vermont Department of Health, to participate and act as a resource in the trainings. Vermont SMP and AG are also collaborating on the design and delivery of a statewide training regarding senior exploitation.

Like many other SMP Directors, Anita has also cultivated relationships with the Vermont Senior Service Corps (including RSVP), SHIP and Area Agencies on Aging. The Vermont SMP and RSVP have been partners for two years. They have a Memorandum of Understanding that includes a modest stipend for the RSVP's administrative costs. The RSVP assists in volunteer recruitment and provides possible opportunities

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for training, outreach and presentations. This partner has proven to be a great resource for volunteers due to the interviewing and interest profiling, as well as their large pool of 3,400 individuals. The SMP also has a paid formal relationship with SHIP, which houses counselors in five Area Agencies on Aging. Initially, Anita found that this was a challenging relationship to develop. However, Anita and the SHIP director have worked together to make it a more mutually supportive partnership. Vermont SMP and SHIP now work closely on a number of project-related issues, task forces and training opportunities.

Anita has developed her most innovative and unique relationship with the Lyric Theater of Vermont, non-profit theater organization. The SMP recruits senior actors and five skits have been developed for Lyric Theater's Savvy Seniors group. One of the Savvy Senior Actors has developed two of the skits. At this time, the skits cover mail fraud, medication management and Part D, billing fraud and identity theft. The community has enthusiastically received these skits. Anita reports that senior centers will often call and request performances. The group also performs in senior residential housing and for the Red Hat Society (a women's social group). These skits have become so popular that Anita is currently trying to form regional teams to more effectively target the entire state. The theater originally became involved with this project due to the Lyric Theater director's interest in senior issues. Anita has found that it is a mutually rewarding and balanced relationship. She does most of the organizing, performance scheduling and all of the initial SMP training. Lyric Theater offers rehearsal and performance times. The Vermont SMP has found that this project is a powerful draw for volunteers who have an interest in community acting instead of solely providing lectures on health care fraud.

Through all her partnership efforts, Anita has found several tips to be helpful. First, it is important to find a common link or thread between the potential partners. For example, the Lyric Theater director had previously directed a senior center and has a natural draw to and respect for older people. Second, partners who work on closely related issues must openly discuss boundaries so that toes are not stepped on. Finally, Anita noted that it is important to find ways to provide your partners with recognition. She has found that partners and volunteers, like all of us, appreciate being valued and recognized for making a difference and contributing to the SMP work.

Media Outreach

Need help in you media outreach efforts? Visit The Center's website. There you will find a series of articles in past editions of The Sentinel that contain helpful information to help your program increase visibility through successful media outreach efforts. Topics include:

* An Introduction to Media Outreach
* Interview Tips
* Media Advisories and Press Releases
* Letters to the Editor and Op-Ed Pieces

To view these helpful resource visit The Center's website at www.smpresource.org.

Where is My Medical Summary Notice?

When it comes to teaching Medicare beneficiaries and their caregivers about fighting potential fraud and abuse, SMPs have always used the Medicare Summary Notice (MSN) as a tool. The Medicare Summary Notice is an easy-to-read statement that clearly lists the health insurance claims that have been processed on behalf of the beneficiary. Encouraging beneficiaries to review their MSNs on a monthly basis was a key message for detecting potential fraud, errors or abuse. However, last fall the Center for Medicare and Medicaid Services (CMS) changed the delivery schedule for MSNs.

On October 29, 2007, CMS implemented a change in the frequency of MSN deliveries by informing beneficiaries that: "If you aren't due a payment check from Medicare, your Medicare Summary Notices (MSN) will now be mailed to you on a quarterly basis. You will no longer get a monthly statement in the mail for these types of MSNs. You will now get a statement every 90 days summarizing all of your Medicare claims."

With this new quarterly MSN delivery schedule, SMPs should be prepared to slightly alter their detection message and educate beneficiaries and caregivers about this change.

Although MSNs will not be mailed on a monthly basis, beneficiaries can still access their current Medicare account 24 hours a day by visiting www.MyMedicare.gov.

CMS announces change to MSN

As of Monday, January 7, 2008, the first five digits of the Health Insurance Claim Number (HICN) have been replaced with "XXX-XX" on Medicare Summary Notices (MSN). This will prevent a full display of the Medicare beneficiary's personally identifiable information. All types of MSNs (e.g. pay, no-pay and duplicate copies) are included in this change. The resulting increased privacy should assist the SMPs with efforts to protect beneficiaries from identity theft.

Scam Alerts

Hardly a day passes that we don't hear of healthcare's ever rising costs or about Medicare fraud. Medicare spends more than $228 Billion dollars annually for health care, most of that money is spent on items and services needed by the programs beneficiaries. However some greedy individuals have devised cleaver schemes and scams to line their pockets with some of these dollars.

SMPs, teach Medicare beneficiaries in your state to look out for these slick scams!

In some states one or more persons, usually wearing white lab coats show up at people's homes and introduce themselves as local health clinic workers. They state that they are making home visits to seniors in the community to make certain that people are receiving the medical care that they need. They state that their services are free. They offer to take the person's temperature, pulse and blood pressure after which they suggest additional testing, perhaps even taking the beneficiary to a clinic. They arrange a time to pick them up and ask for the beneficiary's Medicare number. No-one ever appears to take them to the clinic, having receiving a Medicare number they bill Medicare for a clinic visit, various tests and oftentimes an ambulance trip.

SCAM ALERT CONTINUED FROM PAGE 6

Someone is calling people in the mid-west claiming to be a Medicare Records Reviewer. The caller states that he has reviewed the beneficiary's Medicare account and that there are unused Medicare benefits for which a refund should be issued. The caller will then ask the beneficiary to verify Medicare number. After receiving the Medicare number, the caller states a refund in the amount of $399 will be issued. The caller then asks the beneficiary for their bank account number to deposit the refund into their account.

There has been someone going door-to-door in several southern states offering free nutritional supplements. The salesperson states that the government wants to promote healthy lifestyles and Medicare will pick up the costs. The sales person goes on to state that each month someone will deliver the canned drink to their doorstep, they only thing needed is their Medicare number.

These are some examples of the scams being reported across the country. To submit a scam alert to be included in future newsletter articles contact Shirley Merner.

SMART FACTS Data Entry Quality Assurance

With a year of experience under everyone's belts, the overall data in SMART FACTS is looking great. However, a frequent question posed to The Center has been "I know I put my data in, but how do I know it stayed there?" Often, these questions arise as people begin preparing for the OIG Report due date and take a preliminary look at their numbers on the OIG Report. The OIG Report in SMART FACTS, even if it is not due for actual submission to the OIG, is a good barometer of your data entry accuracy. You can run this report at any time to summarize your totals and see if they look logical.

How to view the OIG Report:

* Select the **Report** button on the right-hand side of the screen (from any program within SMART FACTS)
* Next, select **Letters, Forms & Reports**
* From the left side of your screen, select "**OIG Performance Measure Report**" (you will have to scroll to find it)
* Enter the appropriate date range.
* Select "**Submit**."

A. Possible reasons for inaccurate numbers on the OIG Report:

Outcomes #1 – 3 (volunteer outcomes):

* If you have not entered the work or training hours for each of your volunteers within the *Volunteer Tracking and Management* Program within SMART FACTS, the totals for this section of the OIG Report will be affected. The number of total active volunteers will often be lower than your total number of enrolled volunteers. That's okay – only volunteers for whom you have entered work or training hours during the given OIG Report time period will count toward this total.

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Outcomes #8b - #8d (survey outcomes):

* If you have negative numbers here, you have entered surveys that were not fully completed by the respondent. Remember to discard any incomplete survey. When you enter the total number of surveys, it should be only the total number of completed surveys.

Outcome #9 (one-on-one counseling):

* When entering volunteer hours, one of the options is "volunteer work – one on one counseling." You need to ALSO enter the counseling in the "Outreach and Education" program of SMART FACTS. Volunteer hours are put into categories in order to determine the dollar value for their in-kind match. The OIG report calculates one-on-one counseling numbers from the "Outreach and Education" program in SMART FACTS...

Outcomes #12 (total # complex issues received):

* Outcome #12 (number of Complex Issues received) goes by the date of the Inquiry Form. If you entered your Complex Issue into SMART FACTS in a different OIG report period from when the complex issue actually was received by your office, you can change the Inquiry Form date to reflect the true date of the inquiry (by default, that date will be the date of data entry, unless you manually change it).
* Another reason for an error in Outcome #12 would be the result of entering multiple inquiry forms (also called "assessments" in SMART FACTS) for a single complex issue. Instructions for correcting this problem are found in the "Inquiry Form Data Clean Up" section of this article.

Outcomes 16 and 17 (Complex Issue cost avoidance and recovery):

* If you are suspicious of your totals here, make sure that you have correctly entered the *Status of Complex Issues* **required** fields for each inquiry form (found on the *Activity Log* page of the Inquiry Form). Make sure you are ONLY using the fields marked **required** in that section and NOT the other fields in that section. As the status changes, change your selections and dates in the fields marked **required**. Mistakes here are a common reason for OIG report errors. Further instructions are found in the "Status of Complex Issues Data Clean-Up" section of this article.
* The data for Outcome #16 comes from the Activity Log of the Inquiry Form. Data for Outcomes 17A – 17D are in the PSC/MEDIC Referrals tab of the Inquiry Form.
* Finally, if you did not "Submit" your inquiry form for a complex issue, but instead chose "Save Draft," that complex issue will not be fully recorded in SMART FACTS and will not show up on the OIG Report, affecting every outcome from #12 through #17. Instructions for finding and

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correcting this problem are located at the end of this article.

B. Using "Review My Efforts" and "Review Staff Efforts" to check past data entry

Review My Efforts

To review past data entry, you must be aware of which program within SMART FACTS the different types of data are originally entered.

1. From the **My Work** option on the right navigation bar, select **Review My Efforts**.

2. Enter the appropriate date range beneath the **Select Dates for Review** heading.

3. Click on **Submit**.

4. Check to see that you are viewing data for the appropriate program. **If** you need to change the program, click on **View Other Programs**, make the change, and proceed.

5. Scroll down until you see the **Select All Details** checkbox. Click on it so that a checkmark appears. Note: Ignore the rest of the information on the screen. The information you need will appear when you have completed the steps that follow.

6. A confirmation pop-up will appear. Click on **Yes**

7. Click on **Submit**

8. Scroll down until you see heading in green (in the example below, these headings include **General Outcomes** and **General Composite Outcomes**).

9. Click on **Toggle Outcome Details** and/or **Toggle Client Details** (in blue font) beside the particular outcome or assessment that you wish to review.

> **NOTE:** Pay attention to text in green or bold. The headings are in **green.** They introduce areas of this report that contain data for your site. The data itself is contained *within* **bolded** sub-headings. Ignore rows that are not bolded or green and begin with "There is no….."

10. Clicking on **Toggle Outcome Details** and **Toggle Client Details** (if that option appears) will allow you to view the summary of your data for the selected activity.

11. To print the information on this screen, scroll to the top of the page and click on the **Print** button. Depending on how many toggles you have open, the resulting printed data could span several pages.

Review Staff Efforts

To begin, choose **Administration** from the Navigation Bar. Then, choose the **Edit Staff's Efforts** subtopic. Select a username from the list for your site. Continue with steps #2 - #10above.

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C. Using "*Edit My Efforts*" and "*Edit Staff Efforts*" to correct Outreach and Education program data entry errors

Edit My Efforts

To edit Outreach and Education data, you need to first know the date on which the activity occurred. You also must be in the "Outreach and Education" program within SMART FACTS.

1. From the **My Work** option on the right navigation bar, select **Edit My Efforts**.
2. Beside **Select Date for the Recorded Effort,** enter the date of the activity you wish to edit or delete.
3. Click on **Submit.**
4. The data for your matching event will appear. Select the **Edit Composite Effort** option on the right side of the screen.
5. You will be taken to the on-line form. Edit your data as needed. To save your changes, click on **Update Effort** in the lower right hand corner of the screen.

Edit Staff's Efforts

Follow the steps above, except choose **Administration** from the Navigation Bar. Then, choose the **Edit Staff's Efforts** sub-topic. Select a username from the list for your site. Continue with steps #2 - #5 above.

D. Status of Complex Issues Data Clean-Up

IMPORTANT:

* DO NOT keep a history of past status entries. You should ONLY track the current status. Therefore, use only one the first status field (marked **required)** and revise it to reflect changing status.
* AVOID THE SECOND AND THIRD SET OF STATUS FIELDS. THEY WILL SOON BE DELETED FROM SMART FACTS. IF YOU HAVE DATA IN THESE FIELDS, MAKE SURE IT IS OLD STATUS DATA, NOT CURRENT STATUS DATA.
* Make sure the correct **Current Status** selection is marked with a black dot:
  * An issue that is **Open** will contribute to the total in Outcome #15 of the OIG Report: "*Number of Complex issues pending further action*
  * An issue that is **Closed** will contribute to the total in Outcome #14 of the OIG Report: "*Number of Complex issue resolved."*
  * **Suspended** issues will not appear on the OIG report.
* For **Date of status update (required)**, enter the date the activity occurred, not the date of data entry into the system. , unless they occurred on the same day.

E. Inquiry Form Data Clean-Up

You will want to make sure you haven't entered more than one inquiry form per complex issue (also called an

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"assessment" in SMART FACTS). Occasionally, in the past, multiple inquiry forms were developed for a single complex issue.

<u>How to know if you have entered too many Inquiry Forms for a complex issue:</u>

1. Go to the *Issues and Inquiries Program.*
2. Click on *Issues/Inquiry Work*
3. Click on *Review Specific Inquiry*
4. Click on *Search*
5. Your total list of people with complex issues will appear. Click on **Go** beside the first name on the list.
6. **Most of the time there should be only ONE inquiry form showing in the resulting list. Each inquiry form should represent a unique complex issue. Sometimes, an individual will be unlucky enough to be involved in several complex issues (for example, the potential victim of fraud from several different providers). If that is the case, there will be more than one inquiry form.** [If you have multiple inquiry forms listed for a person with only ONE complex issue, you have in the past clicked on *Take New Assessment* or *Build New Assessment* on this screen each time you returned to SMART FACTS to enter more data about that complex issue. You will RARELY choose either of these options from this screen. The only time would be if a person contacted you with ANOTHER, DIFFERENT complex issue at a later point in time. In Florida in 2007, for example, there was an instance of a single individual needing help from the SMP due to potential fraud, waste, or abuse from *39 providers at the same time*. In that unique circumstance, it was necessary to complete 39 inquiry forms ("assessments") under one person's name.]
7. <u>What you **should** do when you need to enter additional data about a single complex issue is click on the arrow in the last column under "Take Action" and choose "Update</u>." This will take you to your previous data entry. You can add and modify the data as needed. Each complex issue should only have ONE Inquiry Form.
8. Repeat steps #3 - #5 above to check the number of Inquiry Forms for each of your participants on the list (or for selected participants).

<u>To correct your data if you have multiple inquiry forms for ONE complex issue:</u>

1. Go to the *Issues and Inquiries Program.*
2. Click on *Issues/Inquiry Work*
3. Click on *Review Specific Inquiry*
4. Enter the last name of the person whose data you need to correct
5. Click on *Search*
6. Click on *Go* beside that person's name. Their multiple inquiry forms will be listed.
7. In the "Take Action" field beside the first inquiry form, click on the "Take Action" arrow.
8. Click on "Response Report"

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9. Print the Report. (click on the printer icon in the upper left corner)
10. Repeat the above steps and print a "Response Report" for every *Inquiry Form.*
11. Repeat all of these steps for <u>each participant</u> with multiple *Inquiry Forms*

<u>Once you have printed your multiple inquiry forms, do the following in SMART FACTS:</u>

1. Choose ONE of the inquiry forms to keep (usually the one with the most data)
2. Delete all the rest. You do this by choosing *Delete* in the "Take Action" field
3. For the remaining inquiry form, choose *Update* in the "Take Action" field (sometimes you will have to repeat your steps #3 - #6 above to get back to the screen where you can select *Update*).
4. Enter the necessary data from your printed "Response Reports" so that your ONE remaining inquiry form captures the full picture.
5. When you are done, click on "Submit."
6. Repeat this process for <u>each participant</u> with multiple inquiry forms.

<u>Always, always</u> remember to have correct data in the *Status of Complex Issue* section of the *Activity Log*.

<u>F. "Save Draft" vs. Submit</u>

In the *Issues and Inquiries* program, SMART FACTS gives you the option to "Save Draft" or to "Submit" an inquiry form. You must choose "Submit" for your data to show up on the OIG Report. "Submit" is the permanent option.

If, when reviewing your Inquiry Forms, you see that your inquiry form is a "draft," you must <u>click on the arrow in the last column under "Take Action" and choose **Update**</u>.

This will take you into the draft inquiry form. Click on **Activity Log.**

Check your data entry for accuracy as needed.

Click on **Submit** at the bottom of the screen.

<u>Conclusion</u>

You can always call Social Solutions if you feel the software is making mistakes or have questions about possible technical problems with the software or your computer's ability to access the software. Their customer service phone number is 866-732-3560, extension #2.

If you are dissatisfied with Social Solutions' response to your question, if you have a question about the SMART FACTS manual, or if you need guidance regarding SMP definitions or policies as they relate to SMART FACTS data entry, call The Center at 877-808-2468 or contact Ginny Paulson at gpaulson@hvaaa.org.

Visit us on the web at www.smpresource.org

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For more information about the National Consumer Protection Technical Resource Center, please visit us at www.smpreource.org.

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