

Introduction

This job aid is intended to provide a quick reference guide for the basic steps to enter simple inquiries and one-on-one counseling sessions, and access related forms in SMART FACTS. For detailed instructions and comprehensive explanations on policies and data entry, see the SMART FACTS Operations Manual.

OIG Definition of a Simple Inquiry

According to the OIG, a simple inquiry is brief contact initiated by the consumer and/or beneficiary that is resolved with minimal time and research or review. Simple inquiries typically do not require individual personal identifying information, such as a Medicare number or information about a medical condition. See the SMART FACTS Operations Manual for examples.

OIG Definition of a One-on-One Counseling Session

According to the OIG, a one-on-one counseling session is a meeting between SMP staff or volunteer and an individual beneficiary and/or his or her family for the purpose of discussing or gathering information about potential healthcare fraud, error, or abuse. One-on-one counseling sessions may include beneficiary counseling, information gathering, or information sharing. See the SMART FACTS Operations Manual for examples.

Types of SMP Questions: Simple Inquiry, One-on-one Counseling, Complex Issue

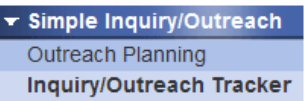
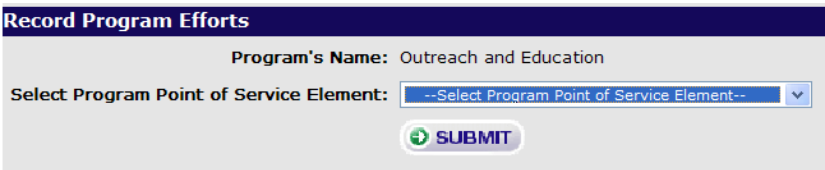
Make sure you are familiar with how to identify each of the different types of SMP questions! See the SMP Counselor Training Manual, Chapter 1 for a detailed flow chart to help you determine if a conversation with a beneficiary is a simple inquiry, one-on-one counseling, or complex issue.

Batch Entry of Simple Inquiries or One-on-One Counseling Sessions

Batch entry allows data with similar characteristics (same county, same issue, etc.) to be entered at one time. Since only one date can be entered, simply select a date, like the last day of the month, and enter your simple inquiries **or** one-on-one counseling sessions with matching criteria. Simple inquiries and one-on-one counseling sessions cannot be entered in the same batch.

Entering a Simple Inquiry or One-on-One Counseling Session in SMART FACTS

To enter a simple inquiry or one-on-one counseling session in SMART FACTS, take the following steps.

Step	Action													
1	Select Outreach & Education Program (if not already selected).													
2	Click Simple Inquiry/Outreach on the right, then click the Inquiry/Outreach Tracker sub-topic.													
3	Select the appropriate option from the Select Program Point of Service Element drop-down menu (Simple Inquiry or One-on-One Counseling Session) and click Submit . 													
4	Complete the data entry form as applicable. Most fields are self-explanatory. Some tips are provided here: <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th>Data Field</th> <th>Tip</th> </tr> </thead> <tbody> <tr> <td>Contact Location / Method</td> <td>Make the appropriate selection from the drop-down menu.</td> </tr> <tr> <td>Date of Contact</td> <td>Enter the date that the conversation was held with the beneficiary. Note: Although it is not yellow, this field is required for the OIG report.</td> </tr> <tr> <td>Date of Next Contact</td> <td>This field is NOT used by SMPs and should be left blank.</td> </tr> </tbody> </table>		Data Field	Tip	Contact Location / Method	Make the appropriate selection from the drop-down menu.	Date of Contact	Enter the date that the conversation was held with the beneficiary. Note: Although it is not yellow, this field is required for the OIG report.	Date of Next Contact	This field is NOT used by SMPs and should be left blank.				
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Entering a Simple Inquiry or One-on-One Counseling Session, *continued*

Step	Action	
4b One-on-One Counseling Sessions	Data Field	Tip
	Primary and Secondary Topic	Select the appropriate options from the drop-down menus.
	Primary County (New Value)	County where the one-on-one counseling session was held
	Session Conducted By (New Value)	Select the appropriate options from the drop-down menus.
	Targeted Beneficiary Population	Select the appropriate options from the drop-down menus.
	Number of One-On-One Counseling Sessions	Enter the number of one-on-one counseling sessions. More than 1 can be entered if they happened on the same day, same county and on the same topic.
5	Save your work <ul style="list-style-type: none"> • Save Effort & Close = saves your work and closes this entry. • Save & Record Similar Effort = saves your work and allows you to enter another entry of the same type. 	

Accessing the Simple Inquiry Form and the Outreach Tracking Form

The Simple Inquiry Form and the Outreach Tracking Form can be used to collect the basic information needed for data entry into SMART FACTS. Take the following steps to access these forms. See the SMART FACTS Operations Manual for more information.

Step	Action
1	Click on Reports from the right navigation bar, then click on the Letters, Forms & Reports sub-topic.
2	On the left side of the screen, scroll until you see the section on Outreach and Education Forms and Reports . Click on the desired form to open or save it: Simple Inquiries Form and/or Outreach Tracking Form .

SMP Resources: Outreach & Education

Resource	Purpose	Access Instructions
SMART FACTS Operations Manual	Outreach and Education Program in SMART FACTS	www.smpresource.org > Resources for SMPs > SMART FACTS > SMART FACTS Operations Manual
SMART FACTS Training	Recordings, job aids, and handout related to Outreach and Education in SMART FACTS	www.smpresource.org > Resources for SMPs > SMART FACTS > SMART FACTS Training
SMP Counselor Training Manual, Chapter 1	Provides explanation of the difference between simple inquiries, one-on-one counseling sessions, and complex issues	www.smpresource.org > Resources for SMPs > Training > Volunteer Training > SMP Counselor Training
Additional Outreach and Education Materials	Outreach materials developed by other SMPs are available in the Resource Library	www.smpresource.org > Resources for SMPs > Resource Library
The SMP Resource Center (The Center)	Policy guidance and questions about SF data entry and the SF Manual	E-mail: sengelken@smpresource.org , hflory@smpresource.org , or gpaulson@smpresource.org Call: 1-877-808-2468