

INTRODUCTION TO SMP VOLUNTEER FOUNDATIONS TRAINER'S GUIDE

Audience

This trainer's guide has three distinct audiences:

1. State-level staff (administrators and other managers) who are responsible for statewide planning, management, and dissemination of information and procedures related to the U.S. Administration on Aging SMP program;
2. Training specialists who are responsible for rolling out the training statewide to local programs; and
3. Local program administrators, training coordinators, and other staff members, as appropriate.

Goal and Purpose

The goal of the SMP Volunteer Foundations Training Curriculum is to provide volunteers with a foundation of knowledge in three main content areas:

1. SMP Program;
2. Medicare Basics; and
3. Medicare Fraud and Abuse.

SMP Volunteer Foundations is not intended to provide job-specific training. Until the specialty training modules are produced (see *SMP Volunteer Training: Phase 1 Implementation Guide*), SMPs should continue to provide additional function-related training to volunteers as they have in the past.

The purpose of this training sequence is to provide a train-the-trainers' program to enable key SMP personnel to become familiar with training materials and activities and to offer the training to local program and volunteer staff.

Objectives

By the end of this training sequence, participants will be able to

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| Chapter 1 | { | 1. Describe the background and mission of the national SMP program; |
| | | 2. Identify the three roles of the SMPs; |
| Chapter 2 | { | 3. Identify components and benefits of Medicare programs; |
| | | 4. Describe eligibility and enrollment requirements of Medicare, Medicaid, and other assistance programs; |
| | { | 5. Review sample MSNs against case files for accuracy; |
| Chapter 3 | { | 6. Describe how Medicare programs are subject to fraud, waste, error, and abuse; and |
| | | 7. Identify strategies to combat fraud, waste, error, and abuse. |

Session Overview

Timeframe:

The total time required for this session is approximately 12 ½ hours of instructional time (including breaks), or 1 ½ to 2 days of training. The training is divided into three discrete segments, one for each of the three chapters in the SMP Foundations Training: Volunteer Manual. The entire training sequence may be conducted over two days (with Chapter 1 and 2 content on the same day and Chapter 3 on the following day), or it may be delivered in individual segments over an extended period of time, one segment per chapter of the SMP Foundations Training Volunteer Manual, thereby affording participants the opportunity to reflect on the knowledge and skills gained before taking the final assessment. The flexibility in the timing is intentional—it allows local SMP programs time, should they wish, to incorporate program-specific policies and procedures into the training.

When scheduling the SMP Volunteer Foundations Training:

1. For Chapter 1 content, allow 2 hours (this includes a 15-minute break)
2. For Chapter 2 content, allow 3 hours (this includes a 15-minute break)
3. For Chapter 3 content, allow 7.5 hours (this includes a 1-hour lunch break and two 15-minute breaks)

See the *Session Outline* (later in this section) for details.

Evaluations:

Training Evaluations give participants a chance to provide feedback on the content and presentation of the training. There are two versions of the evaluation form available for SMP use, depending on how the training is scheduled and offered.

1. The **Course** Evaluation form is used when training is offered over a consecutive two-day period.
2. The **Chapter** Evaluation forms are used when training is offered as individual segments over an extended period of time.

Assessments:

This training uses the word “assessment” rather than “test” in an attempt to set volunteers at ease (Many adults are threatened by test-taking). Use the assessment to gauge your volunteers’ knowledge regarding the SMP Program, Medicare, and Medicare Fraud and Abuse. Administer it after participants have completed all three chapters of the training. A passing score for SMP Volunteer Foundations is **80 percent** (at least 40 out of 50 correct answers). For more information on conducting and scoring the assessment and following up on both successful and unsuccessful assessments, see the *SMP Volunteer Training Phase 1 Implementation Guide*.

Materials Checklist

- ❑ Flash drive or CD-ROM containing file of PowerPoint slides and other training materials
Note: If you do not have the CD-ROM that is provided with the trainer's guide, download PowerPoint slides and other training materials from the NCPTRC Website <<http://www.smpresource.org/>> to a flash drive or CD-ROM.
- ❑ Trainer's Notes
- ❑ Copies of the SMP Foundations Training: Volunteer Manual
- ❑ Copies of Participant's Handout Packet as well as Answer Keys for each participant
- ❑ Copies of the SMP Foundations Training Evaluation form (Course Evaluation or Chapter Evaluations, as appropriate for your session)
- ❑ Copies of the SMP Foundations Assessment (to be administered at the completion of training), blank answer forms, and trainer's answer key
- ❑ Laptop computer and LCD projector (for use with flash drive or CD-ROM)
- ❑ Flipchart marking pens and masking tape for posting flipchart pages to walls
- ❑ Post-It Notes

Preparation Checklist

- ❑ Reserve space for the training.
- ❑ Duplicate handout packet and answer keys for each participant.
- ❑ Assemble participant handout packets (set aside answer keys that contain answers to exercises; distribute these after participants have completed activities that have answer sheets).
- ❑ Make nametags and/or name tents for participants.
- ❑ Prepare Attendance Sheet.
- ❑ Arrange for food and beverage, as appropriate.
- ❑ Arrive at least one-half hour before training is scheduled to begin.
- ❑ Check equipment to ensure that it is working properly.
- ❑ Pre-label flipchart pages, one of the following headings per page:
 - ❑ *Expectations*
 - ❑ *Parking Lot Issues*
 - ❑ *Participant Feedback*

Note: The Participant Feedback page should have two columns: one labeled pluses (+), and one labeled deltas (▲). This feedback page allows an informal feedback from the group concerning training activities.

SESSION OUTLINE

Materials	Activities	Times
TRAINING ON CHAPTER 1 OF SMP FOUNDATIONS TRAINING: VOLUNTEER MANUAL		
Flipchart page for <i>“Expectations”</i> PPT slides 1—8 H-1—H-3 Flipchart page for <i>“Parking Lot Issues”</i> Post-It Notes pads on tables	I. Welcome, Introduction, Objectives, Agenda Review A. Introduction B. Training Objectives and Agenda Review C. Parking Lot Issues D. Evaluation Form	40 min. (20 min.) (10 min.) (5 min.) (5 min.)
PPT slides 9—25 H-4	II. The National SMP Program A. Background B. SMP Program Overview C. Program Accountability (& Volunteer Duties Activity)	30 min. (5 min.) (10 min.) (15 min.)
BREAK		15 min.
PPT slides 26—27 H-5 AK-1	III. Self-Check on Chapter 1 Content	25 min.
PPT slide 28 Flipchart page entitled <i>Parking Lot Issues</i> Flipchart Page of pluses and deltas, + and ▲	IV. Wrap-Up: Training on Chapter 1	10 min.
LUNCH OR BREAK for DAY		
Total Time (including breaks)		120 min. or 2 hours

SESSION OUTLINE (CONTINUED)

Materials	Activities	Times
TRAINING ON CHAPTER 2 OF SMP FOUNDATIONS TRAINING: VOLUNTEER MANUAL		
PPT slides 1—3 H-1—H-2 Flipchart page for “ <i>Parking Lot Issues</i> ” Post-It Note Pads on tables	I. Welcome, Introduction, Objectives, Agenda Review A. Welcome and Introductions B. Training Objectives and Agenda Review C. Parking Lot Issues D. Evaluation Form	15 min. (5 min.) (5 min.) (3 min.) (2 min.)
PPT slides 4—27 H-3—H-7 AK-2—AK-5	II. Background and Overview of Medicare A. Medicare Basics B. The Parts of Medicare C. Medicare Enrollment D. Medicare Statements and Claims Tracking	110 min. (10 min.) (50 min.) (20 min.) (30 min.)
BREAK		15 min.
PPT slides 28—36 H-8—H-9 AK-6—AK-7	III. Extra Help for Persons with Limited Income and Resources	25 min.
PPT slides 37—38 H-10; AK-8	IV. Self-Check on Chapter 2 Content	15 min.
PPT slide 39 Flipchart page entitled <i>Parking Lot Issues</i> Flipchart Page of pluses and deltas, + and ▲	V. Wrap-Up: Training on Chapter 2	5 min.
BREAK for DAY		
Total Time (including breaks)		185 min. (3:05 hrs)

Materials	Activities	Times
SESSION OUTLINE (CONTINUED)		
TRAINING ON CHAPTER 3 OF SMP FOUNDATIONS TRAINING: VOLUNTEER MANUAL		
PPT slides 1—3 H-1—H-2 Flipchart page for “ <i>Parking Lot Issues</i> ” Post-It Note Pads on tables	I. Welcome, Introduction, Objectives, Agenda Review A. Welcome and Introductions B. Training Objectives and Agenda Review C. Parking Lot Issues D. Evaluation Form	15 min. (5 min.) (5 min.) (3 min.) (2 min.)
PPT slides 4—21 H-3—H-4 AK-9	II. Understanding Fraud and Abuse A. Definitions B. Who Perpetrates Medicare Fraud and Abuse? C. Examples of Fraud and Abuse D. Errors and Other Situations that May NOT be Fraud E. Managing Complaints of Fraud and Abuse F. Consequences of Fraud and Abuse for Perpetrators and Beneficiaries	60 min. (5 min.) (5 min.) (10 min.) (20 min.) (10 min.) (10 min.)
BREAK		15 min.
PPT slides 22—28 H-5—H-6	III. Fraud Schemes A. Scams for Obtaining Medicare Numbers B. Common Medicare Fraud Schemes	100 min. (25 min.) (75 min.)
PPT slides 29—33 H-7	IV. How SMPs Combat Fraud, Errors and Abuse A. Protect B. Detect C. Report (& Consumer Tips Activity)	30 min. (5 min.) (5 min.) (20 min.)
LUNCH		60 min.
PPT slides 34—36 H-8 Jeopardy PPT, AK-9	V. Self-Check on Chapter 3 Content/Review of All Three Chapters A. Health Care Acronym Jumble B. SMP Jeopardy!	85 min. (20 min.) (65 min.)
PPT slides 37 <i>Parking Lot Issues</i> Flipchart page of pluses+ and deltas▲	VI. Wrap-Up: Training on Chapter 3	5 min.
BREAK		15 min.
<i>Volunteer Foundations Training Assessment and Evaluation</i>	VII. Assessment and Evaluation A. Assessment B. Evaluation	65 min. (60 min.) (5 min.)
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Total Time (including breaks / lunch)		450 min. or 7.5 hrs

Before the Training Session

The following tasks should be completed before the training session:

- ❑ **Send out flyers** announcing the training and the dates.
- ❑ **Duplicate all handouts** for the session (H-1 through H-5 for Chapter 1; H-1 through H-10 for Chapter 2; and H-1 through H-8 for Chapter 3) and arrange them into participant packets. By providing a packet of materials to each participant, you can avoid constant distribution and handling of materials during the session. Also duplicate the Answer Keys, AK-1 through AK-10, but do not include these in the participant packets. You will want to distribute these one at a time, as participants complete the activities and check their answers.
- ❑ **Duplicate the training evaluations, assessments, and answer keys** for the training – see page vi for details.
- ❑ Ensure that you have the **CD-ROM** with the Training PPTs, which was provided with the Trainer’s Kit. If not, download the PowerPoint slides from the National Consumer Protection Technical Resource Center Web site (www.smpresource.org) and copy to a flash drive or CD-ROM.
- ❑ **Pre-label flipchart pages** for activities, as indicated in Trainer’s Notes.
- ❑ **Order all equipment** (LCD projector, laptop computer, screen, flipcharts). Check the equipment to ensure that it is working properly. Also check the size of the screen and the clarity of print from the back of the room.
- ❑ **Prepare nametags** or name tents for participants.
- ❑ **Arrange for a place** to hold the training session and ensure that it has sufficient space and moveable chairs for break-out activities. Consider the room arrangement that will best facilitate your activities. For this training, it is suggested that, if possible, the room arrangement consist of table rounds that each seat from 5 to 8 persons.
- ❑ **Prepare a participant sign-in sheet** to verify attendance. Include spaces for participants’ names, addresses, program names, addresses, phone and fax numbers, and e-mail addresses. This will be useful if you need to make future contact with participants.
- ❑ **Arrange for refreshments and lunch**, as appropriate.
- ❑ **Read the Trainer’s Notes** for the session, pages 1-25.
- ❑ **Review** the handouts (H-1 through H-5 for Chapter 1; H-1 through H-10 for Chapter 2; and H-1 through H-8 for Chapter 3), the PowerPoint slides (PPT 1 through 28 for Chapter 1; PPT 1 through 39 for Chapter 2; PPT 1 through 37 for Chapter 3; and Jeopardy PPT for the review game), and the Answer Keys (AK-1 through AK-10).