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| **Name** | Jane Adams |
| **Address** | 222 W. Highway; Pleasant, OR |
| **Phone Number** | 250-555-1234 |
| **Complaint** | * You are a home health aide who works for ABD Home Health Care Inc. * For about 3 months, you have worked for ABD and are not sure if they are following the law. * You have been asked to provide services to people who don’t seem to fully need your help. You have a current client who does not seem to be homebound but you have only been with her for 1 month   + Your company told you she needed help with bathing but when you arrived many times she had already made bathed herself and asked you to help her clean her kitchen or walk the dog.   + You have done this as ABD has told you it is important. The supervisor told her to help the client in whatever she needs. * Your other 2 clients seem to need your help. * You believe that this company may be intentionally defrauding Medicare and you want it stopped |
| **Other details** | * You want to remain anonymous * You have not talked with your employer and don’t want to risk losing your job |
| **Key Questions for the SMP** | * Can I remain anonymous? * What types of documents do you need? * How would I know if my company is operating illegally? |
| **For the purposes of this exercise** | * You do not have documents. * You are very concerned about being identified. * Being new to the job, you are confused about all of the rules and regulations so this feels fraudulent but you aren’t certain. |

Case #1

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| **Name** | Mary Tyler, Medicare beneficiary |
| **Address** | 1234 Dieker St., Happyville, ME |
| **Phone Number** | 625-555-9876 |
| **Complaint** | * Your doctor’s office is billing you for services that you think Medicare should pay for. * You have just been billed for your regular diabetes check-up with the usual tests and procedures you receive all the time. Medicare has always paid for these in the past but now the Doctor’s office has provided you the bill. * What the doctor is billing you for happened 2 weeks ago. * Your regular check-up was covered 6 months ago. You didn’t pay anything * You called the doctor and they said that they don’t participate with that Medicare HMO plan that you are enrolled in. This is especially confusing because you don’t think you have an HMO. |
| **Other details** | * You think you have Original Medicare with a Medigap. You have had this coverage for a while. * You received a visit from very nice man a few weeks ago. He came to talk about ways to help you save money on your prescriptions. He helped you sign up for a program to lower your prescription costs. You told him that you didn’t want to change your doctor because you like your doctor. He said that it won’t affect your doctor but will lower your prescription cost. You have his card: * Mr. Nice Guy * Happyville Medicare Plans * Happyville, ME * Phone: 625-123-2222 |
| **Key Questions** | * Why isn’t Medicare paying? * What types of documents do you need? * Can we fix this? |
| **For the purposes of this exercise** | * You have MSNs but not with you. |
| **Reality** | He enrolled you in a Medicare Advantage HMO without your consent or knowledge. Your doctor’s office is not a member of this HMO which means you are responsible for the services you received. |

Case #2

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| **Name** | Bob McElroy, Son of Medicare beneficiary |
| **Address** | 5210 Kinney Dr. Glee, DE (your address) |
| **Phone Number** | 545-555-5454 |
| **Complaint** | * A nursing home is keeping your mom when you think she should be at home. * You think your mom is not getting the care that she needs. |
| **Other details** | * She is diabetic and she falls a lot. She seems to be often going in and out of the hospital. She recently fell and was put in the hospital. She was recently discharged from a hospital and put into a nursing home. * You don’t understand why she is in the nursing home rather than at home recovering. She calls every day to complain. * You can’t check on the facility as you are in Delaware and she is in Arizona * She does fall a lot but has not broken any bones and you think she should be at home. * Your mom has a lot of friends nearby her but no family. * Mom says that they are mean to her. They make her do exercises and other things. * You don’t really know how your mom is doing right now. You saw her 2 months ago and she seemed fine. |
| **Key Questions** | * How can we get the care my mom needs? * What are my choices? * How can you help? |
| **For the purposes of this exercise** | * You are talking to the SMP in the state that you are in and not the state that your mom is in. |

Case #3

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| **Name** | Doris Bennett, Medicare beneficiary |
| **Address** | 5210 Hodges Ln. Rook, MD |
| **Phone Number** | 545 555 5454 |
| **Complaint** | * You think you were recently a target of identity theft. |
| **Other details** | * You got a call from 800-555-9085. You talked to a nice lady who said she wanted to help you take care of yourself. She asked you for your Medicare number but you didn’t give it to her. You want to report it as you think she may have been trying to rob you. * You don’t have the name of the caller. * You don’t know the business. |
| **Key Questions** | * What can the SMP do? * How do we report this attempted fraud? |

Case #4