THE DUDE REFLECTS ON MIPPA REPORTING

2016 SMP/SHIP Conference
Agenda

- **ACL**
  - What to report and how

- **TFI**
  - How to use NPR
  - Reading your reports

- **NCOA**
  - Using numbers to tell the story
  - Watching data trends
  - Closing the gap
2015 MIPPA Reporting Requirements – What changed?

• New Requirement:
  
  • Quarterly data reporting to ACL on client contacts and outreach events
  
  • Data should be reported using the SHIP NPR data system
## National MIPPA Successes

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<td><strong>MSP</strong></td>
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MSP = Medicare Savings Program  
LIS = Extra Help/Low-Income Subsidy  
*Year 2013 Funding Gap
2015 MIPPA Reporting Requirements – Why the change?

- We need to consistently report and share the work being done with MIPPA nationally.

- Reporting is necessary to:
  - Illustrate quantitatively how we are doing
  - “Tell the story” of the great work being done
  - Hold each other accountable
  - If it’s not reported it didn’t happen and doesn’t count
2015 MIPPA Reporting Requirements – What is the reporting requirement?

- **Narrative progress reports**
  - Due semi-annually
    - Sept 30 to March 31 – due April 30th
    - April 1 to Sept 29 – due October 31st
  - Must report how you are doing on your goals, outcomes, key objectives and other major tasks or actions established in your state plan.
  - May use ACL’s template: [http://www.acl.gov/Funding_Opportunities/Grantee_Info/docs/PPR-Instructions_ACL_OMB.pdf](http://www.acl.gov/Funding_Opportunities/Grantee_Info/docs/PPR-Instructions_ACL_OMB.pdf)
  - Submit by email to:
    - MIPPA.Grants@acl.hhs.gov and
    - Your ACL Project Officer (Identified in your NOA)
2015 MIPPA Reporting Requirements – What is the reporting requirement?

Data

- Submitted Quarterly:
  - Sept 30 to Dec 31 – due January 31st
  - Jan 1 to March 31 – due April 30th
  - April 1 to June 30 – due July 31st
  - July 1 to Sept 29 – due October 31st

- Must include:
  - Number of LIS and MSP applications assisted with and
  - Number of Outreach events completed
2015 MIPPA Reporting Requirements – What are the expectations?

- Grantees that have access to the SHIP National Performance Reporting (NPR) tool should use NPR for MIPPA reporting.

- Grantees that do not have SHIP NPR system access must work with their ACL Project Officer to ensure the required data is submitted accurately and on time.
  - Contact your ACL Project Officer if you do not have access to NPR.
SHIP NPR Data Entry for 2015 MIPPA

- MIPPA data entry into SHIP NPR is changed very little for MIPPA 2015. SHIP NPR continues to be used to collect your client contact and outreach events.

- Changes:
  - Special Use Fields (SUF) are still used to tag your MIPPA activity but you can use SUF 1, 2, or 3 to tag your MIPPA activity.
  - Part D outreach is no longer required and should not be reported.
  - Rural outreach is no longer required but should still be recorded.
SHIP NPR Data Entry—What are we counting? Client Contacts

- Individual Client Contacts – Application Assistance with:
  - Medicare Part D Extra Help/Low-Income Subsidy (LIS)
  - Medicare Savings Programs (MSP)
  - Medicaid
  - Defined in the NPR User Guide Client Contact Form updated March 2016, page 2-19 (LIS) & 2-22 (MSP)
What else counts as Application Assistance?

- These actions count as application assistance too:
  - Redeeming, Redetermination and Recertification paperwork for LIS and/or MSP
  - Current MSP applicant wishing to increase benefit level (ex. QI person submitting for QMB)
  - SSA leads data from LIS applications submitted as MSP applications IF your state has an agreement with the state Medicaid office to complete and submit the application
What does NOT count as application assistance?

• These actions **do not** count as application assistance
  • Screening for LIS and/or MSP
  • Mailing incomplete paper applications to beneficiaries
  • SSA leads data from LIS applications submitted as MSP applications
  • Submitting an application for MSP and counting applicant as deemed eligible for LIS (even though this may happen, there is no “direct hand” in submitting the LIS application)
2015 MIPPA Reporting Requirements – What are we counting? Outreach

- All Outreach Events **must** include information on LIS, MSP, or Medicare Preventive Services.

2015 MIPPA Reporting Requirements – What are we counting? Outreach

- All Outreach Events **must** include information on LIS, MSP, *or* Medicare Preventive Services.

NAVIGATING THE WATERS OF MIPPA REPORTING AND DATA QUALITY
Outline

- What MIPPA data does ACL collect?
- What MIPPA data does ACL report back to SHIPs?
- Lessons learned to ensure data quality and integrity
What does ACL collect?

- CC & PAM Records
- SHIP PM & QTR Reporting
- DUAL Demonstration Reporting
- DMEPOS Reporting
- MIPPA Reporting
Client Contact Data Used in MIPPA Reporting

Part D Low Income Subsidy (LIS/Extra Help):
- ☑ 11-Eligibility/Screening
- ☑ 12-Benefit Explanation
- ☑ 13-Application Assistance
- ☐ 14-Claims/Billing
- ☐ 15-Appeals/Grievances

Medicaid:
- ☑ 46-Medicare Savings Programs (MSP) Screening (QMB, SLMB, QI)
- ☑ 47-MSP Application Assistance
- ☑ 48-Medicaid (SSI, Nursing Home, MEPD, Elderly Waiver) Screening
- ☑ 49-Medicaid Application Assistance
- ☐ 50-Medicaid/QMB Claims
- ☐ 51-Fraud and Abuse

ACL Special Use Fields
MIPPA CLIENT 1 2 3:
# PAM Event Data Used in MIPPA Reporting

## Topic Focus (Check All That Apply)
- [ ] 1-Medicare Parts A and B
- [ ] 2-Plan Issues - Non-Renewal, Termination, Employer-COBRA
- [ ] 3-Long-Term Care
- [ ] 4-Medigap - Medicare Supplements
- [ ] 5-Medicare Fraud and Abuse
- [ ] 6-Medicare Prescription Drug Coverage - PDP / MA-PD
- [ ] 7-Other Prescription Drug Coverage - Assistance
- [ ] 8-Medicare Advantage
- [ ] 9-QMB - SLMB - QI
- [ ] 10-Other Medicaid
- [ ] 11-General SHIP Program Information
- [ ] 12-Medicare Preventive Services
- [ ] 13-Low-Income Assistance
- [ ] 14-Volunteer Recruitment
- [ ] 15-Partnership Recruitment
- [ ] 16-Other Topics

## Target Audience (Check All That Apply)
- [ ] 1-Medicare Pre-Enrollees - Age 45-64
- [ ] 2-Medicare Beneficiaries
- [ ] 3-Family Members - Caregivers of Medicare Beneficiaries
- [ ] 4-Low-Income
- [ ] 5-Hispanic, Latino, or Spanish Origin
- [ ] 6-White, Non-Hispanic
- [ ] 7-Black or African-American
- [ ] 8-African Indian or Alaska Native
- [ ] 9-Asian Indian
- [ ] 10-Chinese
- [ ] 11-Filipino
- [ ] 12-Japanese
- [ ] 13-Korean
- [ ] 14-Vietnamese
- [ ] 15-Native Hawaiian
- [ ] 16-Guamanian or Chamorro
- [ ] 17-Samoan
- [ ] 18-Other Asian

## ACL Special Use Fields

**MIPPA CLIENT 1 2 3:** [ ]
What does ACL report back to SHIPs?

Quarterly reports provide:

- National quarterly trends
- State quarterly trends
- Comparative data to similar periods in the past year, colored coded for easy review

### CC MIPPA Totals by Quarter, State & Type of Activity

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<thead>
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<tbody>
<tr>
<td>US Totals</td>
<td>18235 9827 18898</td>
<td>LIS 46960 10743</td>
<td>LIS 9217 18144</td>
<td>38104 0 0 0 0</td>
<td>0 0 0 0 0</td>
<td>85064</td>
<td></td>
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<tr>
<td></td>
<td>861 686 487</td>
<td>2034 302</td>
<td>1862 2556</td>
<td>0 0 0</td>
<td>0</td>
<td>4590</td>
<td></td>
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</thead>
<tbody>
<tr>
<td>US Totals</td>
<td>9795 6922 8974</td>
<td>LIS 25691 7378</td>
<td>LIS 7883 10223</td>
<td>25484 6897 11242 8922</td>
<td>27061 6496 10264 7791</td>
<td>24551</td>
<td>102787</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>67 8 47</td>
<td>122 5 45</td>
<td>43 106</td>
<td>2 37</td>
<td>82 1</td>
<td>1</td>
<td>311</td>
<td></td>
<td></td>
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</table>
Another report that some SHIPs have found helpful, that you may request....

This report profiles “possible” under-reporting of MIPPA activities by county, agency and other geographic units of analyses.

<table>
<thead>
<tr>
<th>Sample Reporting Units --- Counties, Agencies, other</th>
<th>Counts of Qualified MIPPA CCs</th>
<th>Counts of Non-qualifying CCs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pure LIS</td>
<td>Pure MSP</td>
<td>Both LIS 13, MSP 47 or MSP 49, MIPPA 123</td>
</tr>
<tr>
<td>Unit A</td>
<td>5</td>
<td>28</td>
</tr>
<tr>
<td>Unit B</td>
<td>1</td>
<td>8</td>
</tr>
<tr>
<td>Unit C</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Unit D</td>
<td>2</td>
<td>11</td>
</tr>
<tr>
<td>Unit E</td>
<td>1</td>
<td>17</td>
</tr>
</tbody>
</table>

Other Units with NO MIPPA Reporting

Unit A
Unit B
Unit C
MIPPA reports may be of interest to multiple SHIP stakeholders ..... document your activities fully and carefully
Lessons learned to ensure MIPPA data completeness, quality and integrity

- Emphasize with SHIP staff that MIPPA reporting is NOT complete until it is carried to the very last fields (e.g. SUF fields) on the CC and PAM forms.

- States using third party vendors, or a homegrown system, for MIPPA reporting, may not even display the MIPPA SUF fields in their system – the consequences of this can be disastrous.

- Tools exist at the SHIP-NPR Help Desk to help your SHIP report its MIPPA data fully and accurately --- MIPPA reporting rules, data completeness reports, and one-on-one phone conferences.
Questions?

Call us with any questions you have about navigating MIPPA reporting or other issues…….

Technical Frontiers, Inc. Ship NPR Helpdesk

Shipnprhelp@technicalfrontiers.com

1-800-253-7154, ext. 1.
“The Dude” Reflects on MIPPA Reporting
Reporting Can Be Complicated…

There are “a lotta ins, a lotta outs, and a lotta what-have-yous” with MIPPA reporting…
How Data Can Help You

- **Frame the problem in a broader context**

  Provide statistics on how this problem affects the greater community:
  - How many benefit?
  - What are the enrollment trends?
  - How many are missing out on benefits?
  - How many show up at your office facing hunger/debt/foreclosure?
How many benefit in Idaho?

<table>
<thead>
<tr>
<th>District</th>
<th>MSP and SSI Recipients</th>
<th>Full Duals</th>
<th>LIS Recipients</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>16,467</td>
<td>25,070</td>
<td>7,967</td>
<td>49,504</td>
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<tr>
<td>1</td>
<td>8,953</td>
<td>13,049</td>
<td>4,350</td>
<td>26,352</td>
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<tr>
<td>2</td>
<td>7,514</td>
<td>12,021</td>
<td>3,617</td>
<td>23,152</td>
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</tbody>
</table>

Source: [https://www.cms.gov/Medicare/Prescription-Drug-Coverage/PrescriptionDrugCovGenIn/index.html](https://www.cms.gov/Medicare/Prescription-Drug-Coverage/PrescriptionDrugCovGenIn/index.html)
**Medicare-Medicaid Dual Eligible Enrollment by County, 2007-2014**

<table>
<thead>
<tr>
<th>State</th>
<th>Idaho</th>
</tr>
</thead>
<tbody>
<tr>
<td>County</td>
<td>Jerome</td>
</tr>
</tbody>
</table>

**Dual Category**
- QMB+
- QMB-only
- SLMB+
- SLMB-only
- QI
- Other

![Bar chart showing enrollment by dual category for 2007-2014](chart.png)

<table>
<thead>
<tr>
<th>MSP</th>
<th>Dual Category</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicare Savings Programs</td>
<td>QMB+</td>
<td>164</td>
<td>165</td>
<td>168</td>
<td>192</td>
<td>182</td>
<td>206</td>
<td>207</td>
<td>220</td>
</tr>
<tr>
<td></td>
<td>QMB-only</td>
<td>54</td>
<td>56</td>
<td>64</td>
<td>69</td>
<td>83</td>
<td>111</td>
<td>126</td>
<td>133</td>
</tr>
<tr>
<td></td>
<td>SLMB+</td>
<td>15</td>
<td>17</td>
<td>12</td>
<td>12</td>
<td>19</td>
<td>25</td>
<td>18</td>
<td>19</td>
</tr>
<tr>
<td></td>
<td>SLMB-only</td>
<td>49</td>
<td>52</td>
<td>42</td>
<td>46</td>
<td>67</td>
<td>60</td>
<td>67</td>
<td>76</td>
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<tr>
<td></td>
<td>QI</td>
<td>22</td>
<td>28</td>
<td>30</td>
<td>36</td>
<td>48</td>
<td>43</td>
<td>34</td>
<td>46</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>304</strong></td>
<td><strong>318</strong></td>
<td><strong>316</strong></td>
<td><strong>355</strong></td>
<td><strong>399</strong></td>
<td><strong>445</strong></td>
<td><strong>452</strong></td>
<td><strong>494</strong></td>
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<tr>
<td>Other</td>
<td>54</td>
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<td>43</td>
<td>45</td>
<td>32</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>358</strong></td>
<td><strong>389</strong></td>
<td><strong>385</strong></td>
<td><strong>405</strong></td>
<td><strong>442</strong></td>
<td><strong>490</strong></td>
<td><strong>484</strong></td>
<td><strong>530</strong></td>
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How many are missing out on LIS in Idaho?

- SSA letters to likely eligible LIS
  - Limitation: doesn’t consider assets or other sources of income
- Filter by state (county, zip, etc.)
- Identify “hot spots”
- .xls spreadsheet posted in Crossroads

Source: https://www.ncoa.org/economic-security/benefits/visualizations/lis-msp-potential-eligibles/
How many are missing out on MSP in Idaho?

SSA letters to likely eligible MSP
- Limitation: doesn’t consider assets or other sources of income

Filter by state (county, zip, etc.)
Identify “hot spots”
.xls spreadsheet posted in Crossroads

Source:
### How Data Can Help You

- **Educating policymakers**
  - Why current funding to your programs/public benefits is vital to helping underserved groups

### Benefits applications submitted by grantees & their value

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### Sample Report Data

<table>
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<tr>
<th>MIPPA I to NCOA</th>
<th>MIPPA II to NCOA</th>
<th>MIPPA III to NCOA (15 months)</th>
<th>MIPPA IV to NCOA</th>
<th>MIPPA V Year-End Narrative</th>
<th>MIPPA VI, QI via NPR</th>
</tr>
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<tr>
<td>MSP</td>
<td>2,737</td>
<td>3,627</td>
<td>2,128</td>
<td>3,980</td>
<td>3,690</td>
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<td>LIS</td>
<td>4,523</td>
<td>3,176</td>
<td>2,996</td>
<td>1,442</td>
<td>2,231</td>
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<tr>
<td><strong>Subtotal</strong></td>
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<td><strong>5,124</strong></td>
<td><strong>5,422</strong></td>
<td><strong>5,921</strong></td>
</tr>
<tr>
<td>MSP</td>
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<td>1,934</td>
<td>1,347</td>
<td>463</td>
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<tr>
<td>LIS</td>
<td>1,107</td>
<td>1,094</td>
<td>1,431</td>
<td>823</td>
<td>241</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td><strong>1,549</strong></td>
<td><strong>1,899</strong></td>
<td><strong>3,365</strong></td>
<td><strong>2,170</strong></td>
<td><strong>704</strong></td>
</tr>
</tbody>
</table>

MIPPA VI Annual Estimate (Oct-Dec 2015 * 4). Possibly inflated
How Data Can Help You

- **Identify areas of need in your community**
  - Also special accommodations that may be required for your outreach (e.g., translation, disability access, technology considerations)
  - What community partners might help with these accommodations? (cultural groups, affinity organizations)

- **Supplement success stories**
  - Have you played a role in helping more vulnerable Medicare beneficairies access benefits?
Contact Us

Melissa Simpson  Melissa.Simpson@ncoa.org

Visit us online at:

www.ncoa.org
www.ncoa.org/centerforbenefits
www.mymedicarematters.org
www.facebook.com/NCOAging
www.twitter.com/NCOAging