

## SMP Counselor Training Trainer Notes for Flow Chart

When you come to Slide 30, use these notes to walk through the decision making process of the “Types of SMP Questions Flow Chart.” As you work through the process, participants can view the flow chart in its entirety in Appendix A.

---

CLICK (*question appears*)

We always start by asking, “Is the question related to the SMP mission?”

Remember that the mission of the Senior Medicare Patrol (SMP) program is to empower and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, errors, and abuse through outreach, counseling, and education.

CLICK (*word “No” appears*)

If a question is NOT related to the SMP mission, it’s a simple inquiry, regardless of how much time is spent answering the question. Of course, if you are working with other counseling programs such as SHIP or ADRC, make sure to consider which other “hat(s)” you might be wearing. See the SMP Counselor Training Manual, Chapter 1, Page 2, and Handout 3: State Consideration, #2 for more information.

CLICK (*word “Maybe” appears*)

If the question is too complex to be sure, send it to the person at your SMP who handles complex issues so that they can decide.

CLICK (*word “Yes” appears*)

If a question IS related to the SMP mission, it could be a simple inquiry, a one-on-one counseling session, or a complex issue. Additional factors must be considered before making a decision.

So we ask the question...

CLICK (*question appears*)

“Does the answer require review of personal identifying information and/or documentation?”

Remember that “personal identifying information and documentation” consist of your Medicare card or number, your Social Security card or number, MSNs, EOBs or Explanation of Benefits, information about a medical condition, financial account information, and more.

CLICK (*word “No” appears*)

If this type of review is NOT needed, it could be any of the three types of questions. So you need to go to the next step in the flow chart.

## SMP Counselor Training Trainer Notes for Flow Chart

CLICK (*question appears*)

Ask the question, “Is this a brief contact resolved with minimal time, research, or review?”

Remember that “Brief” means the question can be answered in less than 15 minutes (not counting time needed to address communication barriers such as hearing impairment, language issues, side conversations, beneficiary venting, etc.). For simple inquiries and one-on-one counseling sessions, “minimal time, research, or review” means additional “research or review” may be needed by the SMP in order to answer the question. For complex issues, additional research, review, and/or follow-up are typically needed by the SMP to resolve a problem.

CLICK (*words “Yes” and “Simple Inquiry” appears*)

If this is a brief contact which can be resolved with minimal time, research, or review, it’s a simple inquiry!

CLICK (*word “No” appears*)

If it’s not, it could be either a one-on-one counseling session or complex issue. See the next step in the flow chart to decide.

CLICK (*question appears*)

We have to ask, “Can the question be resolved by providing education or information?”

CLICK (*words “Yes” and “One-on-One Counseling Session” appear*)

If the question can be resolved by providing education or information, it’s a one-on-one counseling session!

CLICK (*words “No” and “Complex Issue” appear*)

If additional action is needed, it’s a complex issue

Let’s now go back up in the chart. Back when we asked the question, “Does the answer require review of personal identifying information and/or documentation?” Earlier we said no. What if we said “Yes”?

CLICK (*word “Yes” appears*)

If this type of review IS needed, the question can no longer be a simple inquiry. So we have to go on to the next step in the flow chart to decide if it’s a one-on-one counseling session or complex issue. We now know that this is...

CLICK (*question appears*)

“Can the question be resolved by providing education or information?” If the answer is “Yes”, it’s a one-on-one counseling session. If the answer is “No”, it’s a complex issue.