

Counseling Skills

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Tips for Counseling

- Find out the client's need first, and review your knowledge of the subject matter
- Avoid making decisions for your client
- Encourage your client to act on his/her own behalf
- Be sure you understand the question your client is asking before you provide an answer
- When in doubt, say so. Follow up to get the right answer.



Tips for Counseling

- Do not tell your client that the courts will resolve the problem
- Be alert to claim/appeal time limits
- Agree on what further contact is needed before the meeting ends
- Complete the paperwork during the session
- Keep all clients' medical and financial information confidential
- Enjoy yourself! We hope that you find your counseling experiences rewarding. We are glad that you have joined OSHIIP and look forward to working with you.



How the Community Learns about OSHIIP

- Word of mouth is the best publicity
- Work with OSHIIP to let your community know there is counseling available
- You may want to contact local community organizations (churches, senior centers, retirees club, etc.)
- Remember the OSHIIP newsletter has “News You Can Use” to publicize the information



Preparing for the Counseling Session

- Many times an OSHIP/coordinator will be made aware of someone in need of counseling. The client's name, phone number and nature of his/her case can be forwarded on to you.
- At your earliest convenience, please contact the client. Your identity or phone number will never be revealed to the client unless you share it.
- Before your counseling session you should confirm the date and time.
- Be prepared to spend at least 45 minutes in a counseling session.
- Bring your written materials to assist you in the session.



When You First Meet Your Client

- Introduce yourself and briefly describe OSHIIP and your role as a counselor.
- Explain that your role is to provide objective information to help him/her make a well informed decision.
- Qualify the client by checking for Medicare eligibility.
- Provide the client with assurance of medical and financial confidentiality.



When You First Meet Your Client

- Take into consideration the person may be confused and/or emotional.
- Listen patiently as the client describes his/her situation.
- Observe signs of anxiety or misunderstanding. Provide precise explanation to avoid misunderstandings.
- Encourage the client's participation in pursuing ways to resolve his/her health insurance related questions.
- Obtain the client's approval before taking action on his/her behalf.



Things to Keep in Mind

- You are not required to go a client's house. You can always use OSHIP sites, local libraries and senior centers for counseling sessions.
- Generally, volunteer counselors are not liable for their actions as long they are within the scope of their volunteer duties and in good faith without any malicious intent.
- Your task is to give clients accurate, objective, current information so they can decide what to do about their health insurance.



Things to Keep in Mind

- If you feel a client wants specific advice or that the case is too complicated, you may always refer him/her to an attorney of his/her choice or an agency with relevant resources and jurisdiction.
- If you do not feel confident enough to counsel someone:
 - Always remember that you have extensive training. Think about how much more you know now than when you started training.
 - Most people have not had this training and can benefit from what you have learned.
 - Help is only a phone call away if you need assistance.
 - Use your training manual and other online resources. You do not need to memorize all the information you have learned.
 - Work with OSHIIP to have an experienced counselor work together with you to find the answer to the client's need.



What If I Don't Know the Answer?

- It is ok if you do not know all the answers. Even the experts do not always have the answer to every question right away.
- If unsure about any information, don't answer. Let the client know that it will take a few days to find the information, then inform the client that you will call when you obtain the information.
- Remember, you have many references to help you. People will truly appreciate your hard work to find out the proper information.
- Be sure to follow up on your session. Even if you do not get the information for the client, be sure to call and let him/her know your progress.



When Should I Complete a CCF or PAM?

- Every time you talk to someone using the information you have learned through training you should fill out a CCF or EZ CCF.
- Counseling sessions can be as simple as five minutes.
- The report does not take very long to complete.
- Fill out CCF's or EZ CCF's as completely as possible. Sometimes you may not have all the information that the form requests, however, accuracy is very important – and we want a record of all your hard work!
- The PAM form should be used when you do health fairs, speaking engagements, newsletters or other activities where you reach three or more people and use your OSHIIP knowledge.



Record Keeping

- You must submit a CCF or PAM form for every contact with a client and every event.
- The information received on this form helps the staff understand what types of issues you face as a counselor.
- More importantly, all counseling information must be tabulated and turned into Health and Human Services, the agency responsible for administering grant funding to SHIP programs.
- The quality and amount of data submitted has a direct affect on the grant funding OSHIIP receives.
- The success of OSHIIP depends on your completion of CCF's and/or PAM forms for each visit and each follow-up visit.



Dollars Saved

- OSHIIP Staff and Volunteers saved \$20.8 Million for Ohioans in 2015!!
- Here are some examples:
 - Changing drug plans
 - Difference between the cost of the plans
 - Helping resolve a claim
 - Assisting a client with LIS or MSP application
 - \$4,000 average saved for LIS application
 - \$1,200 Part B premium saved with MSP application



Dollars Saved

- Dollars saved can be reported anytime. It can be for an individual client or a total from several clients.
- You can report dollars saved to OSHIIP in several different ways:
 - Report it on the Client Contact Form.
 - Report it to any OSHIIP staff member.



Next Steps

- Congratulations! You have successfully completed OSHIIP training. Here's what's next:
- Contact OSHIIP
- Contact the Community
- Future OSHIIP Training Opportunities



Contact OSHIIP

- You must contact OSHIIP to let them know you have completed training
 - Rebecca.Hayward@insurance.ohio.gov
 - Volunteer Hotline: 1-888-686-8657
- OSHIIP will follow up with you in person
 - Existing OSHIIP Volunteer Training
 - One-on-One meeting
 - Watch your email for weekly updates from OSHIIP



Contact OSHIIP

- Your Community Liaison will work with you to finish your training
 - [Click here to find your current Community Liaison](#)
- Have a question or need materials to get started?
 - OSHIIP's Community Liaison, Volunteer Ombudsman and hotline staff are here to help
 - [Click here for a list of who's who at OSHIIP](#)



Contact the Community

- Follow up with your County Coordinator to see if there are local volunteer opportunities already in place
 - [Click here for sites and coordinators](#)
 - If your county doesn't have one, let us know if you're interested in that role
- Contact your local senior or OSHIIP site to let them know you're available to help
 - There may be a need in your community for OSHIIP services



Future Training Opportunities

- OSHIIP requires annual update training to stay certified
- Face to Face
 - Volunteer Refresher Trainings
 - OSHIIP Regional Events
- Webinars
 - Monthly on various topics
- OSHIIP Events
 - Medicare Talks
 - Medicare Check-Up Days



Welcome Aboard!

- Welcome aboard to OSHIIP! We look forward to working with you to make the most of your volunteer experience.
- Thank you for completing the training.
- Please contact us with any questions you have:
 - OSHIIP Volunteer Hotline: 1-888-686-8657
 - Watch your inbox for weekly emails from OSHIIP

