

## ELDERinfo PROGRAM POLICIES AND PROCEDURES

In order to make the program run smoothly and reduce confusion, the staff of ELDERinfo has developed some administrative policies and procedures for you, the volunteer health insurance counselor, to follow. As always, if you have any questions along the way, don't hesitate to call us on the ELDERinfo toll-free Hot Line 1-800-336-9500.

### 1. Show up when scheduled.

It is important to show up at the counseling site when you are scheduled because your scheduled counseling session times will be posted at the site, as well as advertised by the ELDERinfo Office in various media. Clients will come and expect you to be there when you are scheduled!

### 2. Stay the entire time you are scheduled.

Some clients will not be able to come in at the start of your scheduled session. They might come in during the last hour, so, it is important for you to stay the entire session time.

### 3. What to do if you are sick and cannot come in when scheduled.

If you cannot make it to the site when you are scheduled, please notify the volunteer coordinator at the ELDERinfo office, and the site liaison at the counseling site as soon as you know you will not be able to make the scheduled session. This procedure is very important because the ELDERinfo staff will try to find another counselor to fill in for you. The site liaisons need to be notified so they can inform the clients that a replacement is being arranged or that the session is canceled. In this case, clients who need assistance right away will be referred to another site or told to call the ELDERinfo Hot Line for immediate assistance.

If you have scheduled appointments for that day, call these clients as soon as possible before the appointment to reschedule. If you are too sick to do this, the ELDERinfo Office will be happy to assist you.

### 4. Completing the Counseling Report Forms.

A Counselor Report Form should be fully completed for each counseling session and contact. This is important should an ELDERinfo or Insurance Department staff member need to become involved or the client needs to be contacted or sent materials. Also, this is very important because the ELDERinfo Office will maintain complete computer records of every session to assess the program's effectiveness, and to pinpoint problem areas we can help you with at future training sessions. Also, the ELDERinfo Office will be using this information to send monthly reports to the Centers for Medicare & Medicaid (CMS) for them to assess the problems of beneficiaries and the success of the program. If you have trouble completing the form, call the ELDERinfo Office for assistance at any time.

5. How to send in the Counseling Report Forms.

The ELDERinfo Office will provide you with a supply of pre-addressed postage paid envelopes for you to send the Counseling Report Forms to the ELDERinfo Office. These forms should be sent in as soon as possible after the counseling sessions, but **no later than the 5<sup>th</sup> day of the following month**. The volunteers working in the ELDERinfo Office should hand in theirs daily. Please try to conserve these envelopes to help us control expenses.

6. What to do when someone requests you to make a "house call."

The ELDERinfo Program wishes to encourage clients who are able to come to the sites during the regularly scheduled counseling sessions. However, there will be some clients who are homebound and unable to get in to the site for the assistance they need. You are not required to make house calls as part of your counseling duties. This is optional and totally up to you. Should you decide to make a house call at a mutually convenient time for you and the client, ELDERinfo will reimburse your mileage (see #8 for mileage reimbursement). If you decide not to make the house call, call the ELDERinfo Office and we may be able to arrange for another counselor to make the house call or assist this person over the phone.

7. What to do when someone wants to schedule an appointment.

If someone wants to schedule an appointment for counseling with you, try to schedule the appointment within your regularly scheduled counseling session. If it is not convenient for the client, it is your option to schedule it outside the session. Schedule the appointment to take place at the site if possible. First, check with the site liaison to see when the site is available. Then contact the client with the time and place to meet. About an hour should be scheduled for the session.

8. How to get reimbursed for mileage.

If you wish, the ELDERinfo Program will reimburse you for your mileage to and from the counseling sites and when on ELDERinfo business at the rate of 40 cents per mile. To get reimbursed, simply complete a Mileage Certification Form and send it to the ELDERinfo Office with the Counseling Report Forms. A check made payable to you will be sent to you.

9. What to do when you run out of supplies.

Supplies, such as the program forms, which include:

- Counseling Report Forms
- Mileage Reimbursement Forms
- Pre-stamped envelopes

and the client informational guides/brochures and shopping aides, which include:

- The Medicare & You Handbook

- The Guide to Health Insurance for Delaware Senior Citizens
- Choosing a Medigap Policy: A guide to Health Insurance for People with Medicare
- The List of Companies Approved to Sell Medicare Supplemental Insurance
- A Shopper's Guide to Long-Term Care Insurance
- The Long-Term Care Insurance Policy Comparison Form
- The List of Companies Approved to Sell Long-Term Care Insurance in Delaware
- The Long-Term Care Insurance Self-Assessment Guide
- Financial Assistance for Seniors
- ELDERinfo Brochure

will be provided to you by the ELDERinfo Office. Some will be provided in bulk following the training. The ELDERinfo staff will be providing you with information on access to supplies.

If, at any time, you receive a request from a client for information guides/brochures you do not have, you can refer them to the ELDERinfo Office. However, we would like to encourage the counselors to distribute materials whenever possible. When receiving requests for guides/brochures other than those listed above, i.e. Guide to Services for Older Delawareans, refer them to the proper publishing agency.

Most participating ELDERinfo counseling sites will have copiers available for the counselor's use. If your site is one of them, it will be possible for you to make copies of ELDERinfo materials for use in counseling. Always check with the site liaison first, and please, use the copier for official ELDERinfo counseling business only to help the sites control their costs. If the site charges for the copies, the client should pay for these.