



# **SMP Group Education Training Manual**

*SMP Resource Center*



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## Acknowledgments

This manual is a product of the Senior Medicare Patrol (SMP) National Resource Center. It was supported in part by a grant (No. 90NP0003) from the Administration for Community Living (ACL), U.S. Department of Health and Human Services (DHHS). Grantees carrying out projects under government sponsorship are encouraged to express freely their findings and conclusions. Therefore, points of view or opinions do not necessarily represent official ACL or DHHS policy.

The principal author for this edition was Heather Flory, SMP Resource Center training manager, who developed this edition of the manual in consultation with Shirley Merner and Sara Lauer from the SMP Resource Center and the 2014-2015 SMP Volunteer Training Committee. Through this committee, feedback was provided by SMPs from Idaho, Indiana, North Carolina, North Dakota, Pennsylvania, South Carolina, and Vermont.

Manual formatting and design was conducted by SMP Resource Center staff Sara Lauer, program coordinator, and Heather Flory, training manager. Editing was conducted by Maureen Patterson, media manager.

This March 2015 edition is updated from the original, which was published in 2012. The 2012 version was developed collaboratively by the SMP Resource Center and SMPs from the District of Columbia, Iowa, Maine, New Hampshire, North Carolina, Oregon, Pennsylvania, and Vermont. Special thanks to the Washington, Pennsylvania, and Illinois SMPs, who provided materials that were incorporated throughout the manual.

## About the SMP Resource Center

The Senior Medicare Patrol National Resource Center, more commonly known as the “SMP Resource Center,” is funded by the U.S. Administration for Community Living (ACL), Department of Health & Human Services (DHHS), and has existed since 2003. The SMP Resource Center serves as a central source of information, expertise, and technical assistance for the Senior Medicare Patrol (SMP) projects.

**National SMP Website:** [www.smpresource.org](http://www.smpresource.org)

This website provides education to the public on health care fraud and how to contact their state SMP. It also contains a “Resources for SMPs” portal with resources, training, and technical assistance for the SMP projects nationwide.

**Nationwide Toll-free Number: 877-808-2468**

Available Monday through Friday, 9:00 a.m. – 5:30 p.m. Eastern Time

**Email:** [info@smpresource.org](mailto:info@smpresource.org)

**Mailing Address:** SMP National Resource Center, Northeast Iowa Area Agency on Aging, 2101 Kimball Ave., Ste. 320, P.O. Box 388, Waterloo, Iowa 50704-0388

## Training Overview

The goal of SMP Group Education Training is to provide the necessary skills and resources to present SMP group education sessions consistently to Medicare beneficiaries, caregivers, and other applicable groups across the country.

As someone who will present SMP group education sessions, you will provide a valuable service to Medicare beneficiaries in your state by helping them become better health care consumers!



## Objectives

Upon completion of this SMP Group Education Training, you will be able to:

- 1) Prepare to give an SMP presentation, using group education resources.
- 2) Give a presentation that provides consistent information about how to prevent Medicare fraud and abuse.
- 3) Follow up after the presentation as needed.

## About This Manual

This training manual provides detailed information to help you meet each of the objectives listed above.

**Chapter 1: Presentation Content** describes SMP group education presentations and resources. It highlights both what to say and what not to say.

**Chapter 2: Customizing the Presentation** provides information on topics such as presentation format and length, target audience, local examples, and other customization tips and best practices.

**Chapter 3: Giving an SMP Presentation** reviews presentation skills and guides you through the steps to give a successful SMP group education presentation.

The **Appendices** provide additional SMP presentation resources.



Throughout the manual, look for “Tip” boxes (like this one), which highlight key tips.

### State and Local Information

Throughout the manual, look for “State and Local Information” boxes (like this one) to help you keep track of information and resources that may be used at a local level in addition to the national information and resources provided.

## **About This Training**

For those of you who are fairly new to presenting, this SMP Group Education Training will provide you with a chance to learn new skills for giving presentations. For others, this will be a chance to review and to practice presentation skills that you have used in the past. If you are an expert presenter, you may have an opportunity to help mentor those who are newer to presenting.

Regardless of your skill level as a presenter, it is important to learn what SMPs across the country are presenting about how to prevent Medicare fraud and abuse so that you can give consistent information.

## **Additional Training**

Prior to taking this SMP Group Education Training, it is recommended that you complete SMP Foundations Training, which provides a foundation of knowledge in three main content areas: the SMP program, Medicare basics, and Medicare fraud, errors, and abuse.

Additional training may be provided by your SMP depending on your volunteer role, as described in SMP Foundations Training. For example, to help you manage questions during or after an SMP group education presentation, SMP Counselor Training or similar training provided by your SMP may be helpful. Please talk with your SMP for more information about training opportunities available in your area.

### **State and Local Information #1: Expectations**

What can you expect as a presenter of group education sessions for your SMP, and what is expected of you? For more information about expectations for presenters in your state, see your SMP's job description and/or talk to your SMP director or coordinator of volunteers. Use this space to take note of any additional information provided by your SMP.

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# SMP Group Education Training Manual

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## **SMP Group Education Presentations**

As mentioned in SMP Foundations Training, group education is one of the key outreach and education activities included in the SMP’s annual OIG (Office of Inspector General) report.

### **What are SMP Group Education Sessions?**

Group education sessions are defined as “formal presentations led by SMP staff or volunteers to educate beneficiaries, family members, caregivers, and others on detecting fraud, errors, and abuse in the health care system and on the services offered by the SMP program.” Group education sessions vary in length from a few minutes to an hour or more, and they may take place with small or large groups. These presentations may or may not include the use of PowerPoints, visual aids, handouts, or other presentation tools and techniques, and even performances or skits.



As mentioned in the *SMP Foundations Training Manual*, **the SMP mission 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.** How to prevent Medicare fraud and abuse is a key topic during SMP group education sessions. As a presenter, it is important that you are familiar with the SMP mission and how to communicate it to others. To review details about the SMP mission, see the *SMP Foundations Training Manual*.

### **How Many Group Education Sessions Do SMPs Hold?**

The OIG report includes SMP outcomes on both the number of SMP group education sessions and the number of people who attend these group education sessions. Each year, SMPs across the country present around 15,000 group education sessions to about 500,000 beneficiaries, caregivers, and others.

#### **State and Local Information #2: Group Education Sessions at Your SMP**

At a local level, your SMP makes a difference! The efforts of each state contribute to the SMP national totals. Use the information provided by your SMP to fill in the number of group education sessions in your state.

<b>How many group education sessions did your SMP hold last year?</b>	
<b>How many group education sessions would your SMP like to hold this year?</b>	

## What to Say

Before giving a presentation, it is necessary to become familiar with the content that will be shared in that presentation. Throughout the rest of this chapter, we will focus on the content of an SMP group education presentation, including: what to say, what not to say, and presentation resources.

### Start Strong

Introductory remarks are critical! Pay special attention to the first minute or two of your presentation. Memorize the first few sentences and practice them until they come naturally, without effort.

If you have time, get the audience's attention with one of the following:

- Startling fact or shocking statistic
- Joke or humorous story
- Story or anecdote
- Quotation
- Question
- Local press release about scams, fraud, and/or SMP



Ideally, your introduction will have the audience thinking, “Wow, I’ve got to hear the rest of this talk.”

### Be Clear and Concise

- Summarize key information at the beginning and end of the presentation. In other words: Tell them what you’re going to tell them; tell them; then tell them what you told them.
- Keep your information organized and to the point to ensure that your audience can follow what you are teaching them.
- Remember that a few straightforward examples can best illustrate a point.

### Know Your Material

Three SMP Group Education PowerPoint (PPT) presentation templates are available as part of this training to give you a solid basis for what to say during your group education presentations. A suggested script using the PowerPoint notes is also available for those who don’t use the PowerPoint format during the presentation (see Appendix C). The PowerPoint templates are described later in this chapter (Pages 9 – 11).

When giving SMP group education presentations and using SMP outreach materials, it is important to be aware of when to use the word “prevent” and when to use the word “protect.” The decision to use the word “prevent” vs. “protect” depends upon the context.

### Protect

The word “protect” appears in SMP brochures, Personal Health Care Journals, fact sheets, and the SMP Group Education PowerPoint presentation templates as part of the phrase “protect, detect, report.”

When listing possible steps to prevent fraud and abuse, the word “protect” typically makes more sense. For example, you might say, “Protect yourself and others from unscrupulous telemarketers.”

### Prevent

The word “prevent” appears in the SMP mission: “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.” The word “prevent” also appears in the tagline of the SMP logo: “Empowering Seniors to **Prevent** Healthcare Fraud.”

As part of a complete sentence, the word “prevent” often makes more sense, such as in this sentence: “Next, let’s talk about how you can help prevent, detect, and report health care fraud, errors, and abuse.” In this context, saying “protect, detect, and report” doesn’t make sense because SMPs are not trying to “protect” health care fraud, errors, and abuse.

The word “prevent” may also be more appropriate when talking *about* SMP presentations, such as during this SMP Group Education Training. For example, the focus of SMP presentations is to provide information about how to prevent Medicare fraud and abuse.

### End with a “Call to Action”

- Identify a few “take home points” that you want your audience to remember, and be sure to state and restate those points clearly.
- Focus on practical fraud prevention tips that participants can start doing right away.
- Encourage participants to take what they know and “pass it on” to friends and loved ones who might not be as familiar with this information.



Beneficiaries should be made aware that participating in schemes to defraud Medicare is illegal. Remind them: “If it sounds too good to be true, it probably is!”

## What Not to Say

Certain topics are not appropriate for SMP presentations. Here are some examples:

- Detailed information regarding Medicare is not the role of the SMP; this is role of the SHIP (State Health Insurance Assistance Program). It is only appropriate to present this type of information if you also do SHIP work, if you have had SHIP presentation training, and if you are scheduled to present SHIP information in addition to SMP information.
- Any other topics that are not part of the SMP role should also be avoided. For example, providing medical information and advice is not a part of SMP work.
- Any topics on which you have not received SMP training should be avoided. For example, please do not answer beneficiary questions that go beyond the scope of your presentation unless you have completed SMP Counselor Training.
- Remember that you may be talking to people who have little knowledge of Medicare and health insurance. Too much information can be confusing and overwhelming. Do not allow yourself to get off topic, use too many stories, or share all of the information you received during training. You can overwhelm your audience that way.
- Additional training may be offered by your SMP director and/or coordinator of volunteers to provide guidance regarding policies on topics such as confidentiality, conflicts of interest, and more. Please refrain from:
  - Political or religious opinions
  - Speaking negatively of Medicare and Medicaid
  - Endorsing any specific products or services
  - Jokes that may be considered offensive
  - Identifying a specific event or provider as fraudulent when it's not a matter of public record
- When in doubt, please discuss with your SMP director and/or coordinator of volunteers to determine if a particular topic is appropriate to include in your presentation or if it should be left out.



**TIP**

When discussing fraud and abuse with clients and other SMPs, keep in mind the concept of “innocent until proven guilty.” Because of this, SMPs use the terms “suspected” or “potential” fraud and abuse.

## Presentation Resources

Many resources are available to help educate beneficiaries about the SMP program and how SMPs can help prevent, detect, and report Medicare fraud, errors, and abuse. Some of these resources are provided nationally while others are developed or customized by your state or local SMP. A variety of resources is available in the SMP Resource Library on the SMP Resource Center website: [www.smpresource.org](http://www.smpresource.org). See Appendix A for tips on finding presentation resources in the SMP Resource Library.

### State and Local Information #3: The SMP Resource Library

Will you have access to the SMP Resource Library, or will someone else at your SMP provide you with the necessary resources? Ask your SMP director or coordinator of volunteers.

In this section we will review some of the resources that are provided at a national level, including video public service announcements (PSAs), PowerPoint presentation templates, and printed reference materials (handouts).

## SMP Video PSAs

On a national level, several different SMP video PSAs are available on the SMP Resource Center website ([www.smpresource.org](http://www.smpresource.org)). All of the videos described below are available in English and Spanish; some are also available in other languages. Depending on the amount of time you have available for your presentation and the setup of your presentation space (i.e., access to Internet), you may be able to show one or more of these videos to participants in your group education sessions.

### Stop Health Care Fraud PSAs

A series of “Stop Health Care Fraud” video PSAs was developed for SMPs by the U.S. Department of Health and Human Services (DHHS) as part of a campaign in 2011. These PSAs show beneficiaries how to protect their Medicare number, detect errors by reviewing their statements, and report fraud. The 60-second video PSA is available on the SMP Resource Center’s website in the Videos section.

The entire series of videos (60-, 30-, and 15-second versions in English and Spanish) and related materials are available at: [www.StopMedicareFraud.gov](http://www.StopMedicareFraud.gov).

**Tip:** Search the website for “PSA.”



**Don't Be a Target of Healthcare Fraud PSAs**

In 2006 the U.S. Administration on Aging (AoA) developed a series of three videos called “Don’t be a Target of Healthcare Fraud” for SMP use. These videos provide the SMP Resource Center toll-free phone number and website. They are available on the SMP Resource Center’s website in the Videos section and in the SMP Resource Library. They are:

- 1) Superheroes (33 seconds): In this public service announcement, a “ScamGram” SMP volunteer stands up for Medicare beneficiaries.
- 2) Joining the Good Guys (10 minutes, 22 seconds): This PSA teaches viewers to prevent, detect, and report health care fraud with examples taken from the SMP program and tells viewers that they have the power to make a difference.
- 3) Recognizing the Bad Guys (7 minutes, 39 seconds): This PSA teaches viewers to prevent, detect, and report health care fraud. It shows scammers in action on the phone and in person.



**State and Local Information #4: SMP Video PSAs**

Does your state or local SMP use any national or local video PSAs during group education sessions? If so, use this space to make note of your SMP’s preferred resources.

Resource	Description

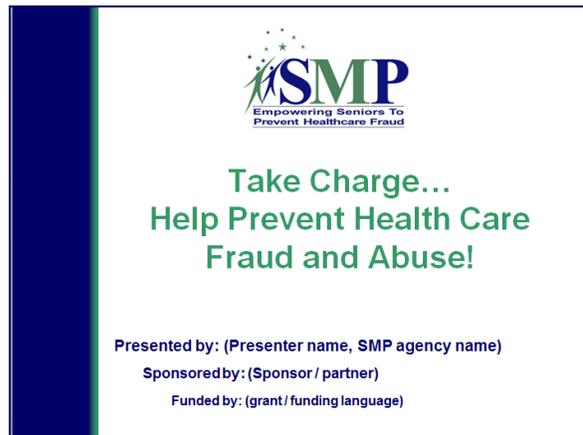


**Find it in the SMP Resource Library!**

Additional resources are being created on an ongoing basis. See Appendix A for tips on searching for videos and other resources in the SMP Resource Library.

## PowerPoint Templates

SMPs have many different types of opportunities for presentations, including standalone presentations and those that are presented jointly with a partner or group of partners. With this in mind, several PowerPoint (PPT) templates have been developed for SMP presentations of varying lengths: 10-minute, 20-minute, and 30-minute presentations. These PPT templates are provided in Appendix C and are also available in the SMP Resource Library on the SMP Resource Center website ([www.smpresource.org](http://www.smpresource.org)).



Regardless of the length of the presentation, each one must fulfill the SMP mission in order to be considered an SMP presentation.



### **Presentations Without PowerPoint**

Even if you don't show the PowerPoint to the audience during your presentation, you can use the script in Appendix C for talking points.

## The 10-minute presentation

If you only have 10 minutes to present a group education session, it will need to be very straightforward and to the point. Make sure to choose your words carefully! An outline of the suggested content and timing for a 10-minute presentation are provided here. See the 10-minute PPT template in Appendix C for a suggested presentation and script.

<b>Suggested Content: 10-minute presentation</b>	<b>Timing</b>
Consequences of Fraud, Errors, and Abuse	3 minutes
SMP Program	1 minute
Medicare Fraud and Abuse	3 minutes
Protect, Detect, Report	3 minutes

**The 20-minute presentation**

With a few more minutes to give your presentation, you have time to provide some additional information to your audience. Even so, you still need to choose your words carefully to cover everything in 20 minutes.

An outline of the suggested content and timing for a 20-minute presentation are provided here. See the 20-minute PPT template in Appendix C for a suggested presentation and script.



<b>Suggested Content: 20-minute presentation</b>	<b>Timing</b>
Consequences of Fraud, Errors, and Abuse	4 minutes
SMP Program and Mission	2 minutes
Medicare Fraud and Abuse	3 minutes
Examples of Fraud and Abuse (stories)	2 minutes
Protect, Detect, Report	5 minutes
Volunteering with the SMP	1 minute
Q&A Session	3 minutes

**The 30-minute presentation**

With 30 minutes to give your presentation, you can provide even more detail and talk about even more topics. Although time isn't as much of an issue, it's still important to stick to the schedule and plan your words in advance.

An outline of the suggested content and timing for a 30-minute presentation are provided here. See the 30-minute PPT template in Appendix C for a suggested presentation and script.

<b>Suggested Content: 30-minute presentation</b>	<b>Timing</b>
Consequences of Fraud, Errors, and Abuse	4 minutes
SMP Program and Mission	2 minutes
Medicare Overview	7 minutes
Medicare Fraud, Errors, and Abuse	4 minutes
Examples of Fraud and Abuse (stories)	2 minutes
Protect, Detect, Report	7 minutes
Volunteering with the SMP	1 minute
Q&A Session	3 minutes

**More than 30 minutes**

If you have more than 30 minutes, or if you receive a request for additional topics, consider the following interaction and/or topics to include in your presentation. To stay on schedule with the core SMP topics, save these “bonus” items for the end of your presentation. See Chapter 2 for information on customizing your presentation.

- Additional group interaction
  - Fraud stories from the audience
  - Play a fraud prevention game (see Appendix A for tips on finding games)
  - Additional time for questions
  
- Additional topics
  - Categories of health care fraud and abuse and what to look for in those areas (i.e., home health, DME, Medicaid)
  - How to read a Medicare Summary Notice (MSN)
  - Identity theft
  - See Appendix A for tips on finding materials about specific topics



**Multiple Topics: SMP Fact Sheets!**

For help with additional topics, consider using the SMP fact sheets (see Page 13). Add information from one or more of the fact sheets to your presentation, then use the corresponding fact sheet as a handout.

**State and Local Information #5: Presentation Topics**

Are any additional topics included in your SMP’s presentations? Ask your SMP director or coordinator of volunteers and make note of any additional information here:

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### Other Printed Reference Materials (Handouts)

A variety of printed reference materials are used by SMPs as handouts during group education sessions.

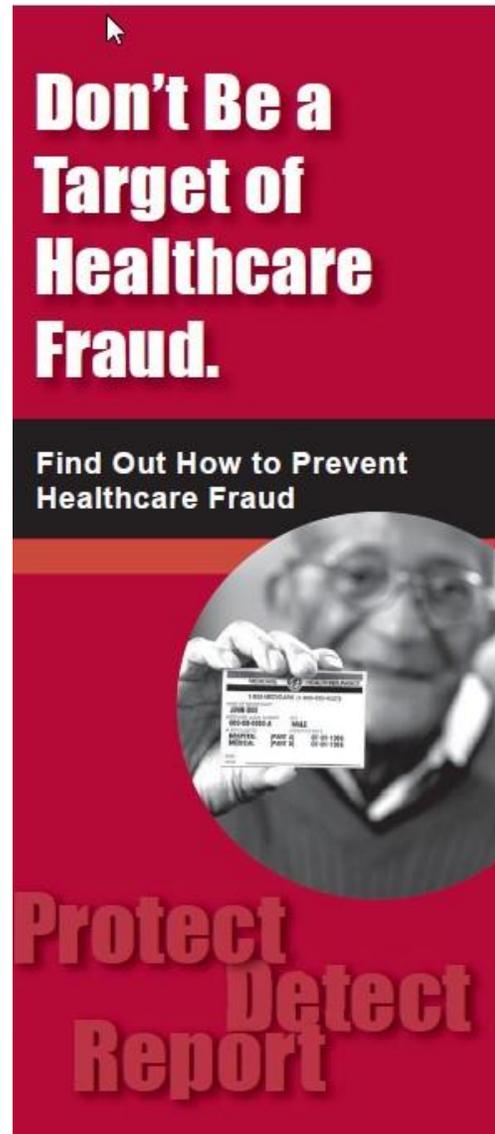
- On a national level, the SMP brochure, Personal Health Care Journal, fact sheets, and other resources are available in the SMP Resource Library on the SMP Resource Center website ([www.smpresource.org](http://www.smpresource.org)). See Appendix A for search tips. Bulk reproduction of these materials is the responsibility of SMPs.
- On a local level, many SMPs also develop their own state-specific printed reference materials to use as handouts.

#### SMP Brochures

The U.S. Administration on Aging (AoA) developed the national SMP brochure in 2006. It focuses on the SMP program and mission, with a heading of “Don’t Be a Target of Healthcare Fraud” and a subheading of “Protect, Detect, Report.” SMPs may customize this brochure to include their state-specific SMP logo and contact information. The SMP brochure has been translated into multiple languages.

#### Personal Health Care Journals

As explained in SMP Foundations Training, Personal Health Care Journals (PHCJs) provide beneficiaries with helpful tips, important phone numbers, and a place to log their health care appointments for later comparison with Medicare Summary Notices (MSNs) and Explanations of Benefits (EOBs). These journals are intended to accompany the national SMP brochure and are commonly used by SMPs as handouts for group education sessions. SMPs may customize these journals to include their state-specific SMP logo and contact information. The PHCJs have been translated into multiple languages.



**Fact Sheets**

The SMP Resource Center has written fact sheets for SMPs to use in their outreach and education efforts. They cover topics such as Medicare fraud and abuse, Medicare Advantage, Medicare Summary Notices, Medicare fraud numbers, the SMP program, health care reform, durable medical equipment (DME), home health, tips for senior housing and senior center coordinators, and medical identity theft. Most of the national fact sheets have been translated into multiple languages. A variety of state-specific fact sheets have also been developed by SMPs that can be used by other SMPs.

**State-specific Materials**

The following is a list of printed reference materials that are commonly used as handouts at the local/state level. Ask your SMP director or coordinator of volunteers if your SMP uses any of these materials, or others, as handouts.

- Local fraud alert emails or newsletters
- Local press releases about scams, fraud, and/or SMP
- Testimonials from volunteers
- Local scam stories: scams to watch out for and/or successful cases resolved in your area

**State and Local Information #6: Handouts**

Does your SMP provide handouts during group education sessions? If so, use this space to make note of any preferred resources.

Resource	Description





## **SMP Group Education Training Manual**

### **CHAPTER 2: Customizing the Presentation**

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## Overview

In this chapter we will look at customizing your SMP group education presentation. How much customization will you need to do? It depends on the situation and also on the expectations of your local SMP. Your SMP may have a standard presentation that is fully prepared in advance, with only a minimal amount of customization needed or desired (such as adding your name or the date). In some cases, you may be encouraged to modify an existing presentation and add new information, or you may even be asked to create your own presentation.



### State and Local Information #7: To Customize or Not to Customize?

Does your SMP expect you to use the SMP presentations as they are provided to you or will you be encouraged to customize them or even create your own? Ask your SMP director or coordinator of volunteers and make note here of any expectations regarding customization:

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#### If You Customize Your SMP Group Education Presentation...

- Ensure that the changes are verified by your SMP director, coordinator of volunteers, or whoever at your SMP is in charge of presentations. SMPs are required to receive approval from ACL before using new or updated materials with beneficiaries, including presentation materials used by SMP volunteers.
- Remember that **every** SMP presentation must fulfill the SMP mission: 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.

## **Presentation Format**

Depending on the situation, you may present your group education session using a PowerPoint presentation or some other presentation format. As you prepare for your presentation, keep in mind the best format for your audience and location and be prepared to make additional modifications as needed.

### **PowerPoint Presentations**

As mentioned in Chapter 1, three SMP Group Education PowerPoint presentation templates (10-minute, 20-minute, and 30-minute) are available for presenters to use when giving SMP group education presentations. These templates are intended to be customized by each presenter. “Notes” versions of the templates (which show the slides with suggested talking points in the “notes” section) are provided in Appendix C.

If you add new slides to your PowerPoint presentation or create your own presentation, consider the following tips:

- Make sure your presentation is easy to read, especially when working with beneficiaries with visual impairments. For example, use a large font size and color combinations with strong contrast, such as dark colors on a light background. Avoid grayscale and distracting backgrounds.
- Consider using the “SmartArt” feature in PowerPoint to make the text more visually appealing (keeping the previous tip in mind). SmartArt converts regular bulleted text into a graphic with text. This feature is accessed in PowerPoint by selecting the text box to convert, then clicking the SmartArt icon on the Home tab to select the desired graphic.
- Limit the number of slides and the amount of information on each slide. Consider the “5 by 5 rule,” which states that you should limit yourself to no more than five bullets per slide and five words per bullet.
- Use the “notes” section of the PPT for your talking points instead of putting them all on the slide. Your presentation will be more interesting if you do not read directly from the slides.
- Use pictures or other graphics to help illustrate the point you are trying to make. However, watch out for copyright violations. Pictures that you take yourself are generally safe choices. Avoid using pictures or news articles that you find online unless you first receive permission from the source.
- If you are creating your own PowerPoint presentation, see Chapter 1, Pages 9 – 11, for suggested topics to include in SMP presentations of varying lengths.
- Remember to have all new and updated materials reviewed by your SMP project director or coordinator of volunteers.

## Other Presentation Formats

If you have no access to a projector and laptop, or if you prefer to avoid using a PowerPoint presentation for other reasons, keep in mind that the printed “notes” in Appendix C may still be used as a script. You may also use a flip chart, chalkboard, or other format, depending on your comfort level and what options are available at the presentation location.



### Flip charts: Friend or Foe?

When using flip charts, consider advantages, disadvantages, and how you can make them work best for your presentation.

Pros	Cons	Tips
Add another visual method to re-enforce key points	Good only for very small groups	Write clearly and only use dark colors
A good way to make note of questions to save for later	Can slow down the pace of the presentation	Prepare ahead of time

## Presentation Length

As mentioned in Chapter 1, the SMP Group Education PowerPoint presentation templates provided in Appendix C are designed for presentations of three timeframes: 10-minute, 20-minute, and 30-minute. However, depending on exactly how much time you have available, you may need to customize your presentation to make sure that you can present all information necessary within the time allowed.

It’s important not to make your presentation too long, since this may be seen as disrespectful to your audience and/or partner agency, and also because too much information can overload your audience.



## Target Audience

When preparing your presentation, it’s important to consider the audience that will attend the group education session. For example, a presentation for beneficiaries and caregivers will be different than one for health care providers. See Appendix A for tips on finding resources for specific audiences in the SMP Resource Library.

When preparing your presentation, ask yourself the following questions in advance about your AUDIENCE. The answers should define your presentation.

- **Analysis** – Who are they? How many will be there?
- **Understanding** – What is their knowledge and experience with Medicare, with the SMP program, and even with attending presentations?
- **Demographics** – What is their age, sex, education? Are they a social group or professional organization?
- **Interest** – Why are they there? What’s in it for them? Who asked them to be there? Who invited me to be there?
- **Environment** – Where will I stand? Can they see/hear me? Is it after lunch? Is it an auditorium or a small meeting room? Will I have access to a projector?
- **Needs** – What are their needs? What are my needs as the speaker?
- **Customized** – What specific needs or issues should I address as the speaker?
- **Expectations** – What do they expect to learn or hear from me? What do I want them to do after my presentation?



### Pass it On!

In 2014, the Federal Trade Commission (FTC) initiated a new consumer education campaign for active older people called “Pass It On.” The FTC’s campaign was based on the idea that older adults are part of the solution, not simply victims of scammers.

Consider the “Pass it On” concept when giving and customizing your presentations. Be careful not to make assumptions about what your audience does or does not already know about fraud and scams. They may know more than you think! Ask those in the know to pass the information on to someone they know who could be helped by it.

For more information about the FTC’s “Pass it On” campaign and related resources, visit:  
<http://ftc.gov/PassItOn>.

If you are unsure of the answers to these questions, talk several days in advance with the event coordinator, the person who invited you to make the public presentation, or whoever at your SMP set up the presentation. While there may be times some of these answers aren’t available, you will be best prepared if you gather as much information as you can before standing in front of the room.

See the “Preparation Checklist” in Appendix B for a detailed list of things to consider regarding your audience and logistics for your presentation.

## Partners and Co-presenters

- When customizing your presentation, it is important to keep in mind any local or state-specific information that can or should be presented in addition to the information about how to prevent Medicare fraud and abuse. For example, if your SMP is also a SHIP (State Health Insurance Assistance Program), you may want to combine both SMP and SHIP information.
- If possible, have your partner organization introduce you. This shows the audience that the partner trusts you and that they can as well.



## Local Information and Examples

In some cases, you may want or need to include local or state information and examples, such as common scams in your area, recent news stories, and statistics. Especially for longer presentations, it will help hold your audience’s attention longer if you can provide real-life examples of Medicare fraud and abuse.

In some cases, your state SMP may have specific requirements based on your grant and/or other funding sources. In these cases you may need to provide additional information in your presentations that is not part of the SMP mission. See Chapter 1 and/or consult your SMP director or coordinator of volunteers for ideas.

<b>State and Local Information #8: Local Information and Examples</b>	
Does your SMP typically include any local or state-specific information in your presentations? If so, take notes here regarding the topics and information to use.	
Topic	Information

## **SMP Best Practices**

There is much to be learned from the experience of presenters at your SMP and even at other SMPs. Tips, techniques, and resources that have worked for others and can be replicated by many SMPs are often referred to as “best practices.”

Here are a few examples of best practices that have been used by other SMPs around the country:

- Do something creative to get the audience’s attention right away. Suggested attention-getters include:
  - Pretend you’re going to light a fake \$100 bill and say, “That’s your Medicare money going up in smoke.”
  - Crumple up fake money and say, “If you don’t protect your Medicare information, you’re throwing money away.”
- Reinforce the importance of tracking medical expenses in the Personal Health Care Journal by showing a picture of a shopping bag full of unopened statements and instructing participants to NOT do this!
- Provide educational tools with SMP contact information and fraud prevention tips or other SMP educational messaging printed on them; for example, notepads, bookmarks, calendars, or pens.



### **State and Local Information #9: Educational Tools**

Does your SMP provide any educational tools during group education sessions? If so, use this space to take notes.

Educational Tool	Description

For more ideas about what works well for other SMPs, visit the SMP Resource Library (see Appendix A for search tips).

## **Personal Preference**

When customizing a presentation that you will give, it’s also important to keep your own experience and personal preference in mind. After all, YOU are the one who will be presenting the information. It should flow in a way that is natural for you, and should be presented in a way that is enjoyable to you.



## SMP Group Education Training Manual

### CHAPTER 3: Giving an SMP Presentation

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## Overview

Now that you are knowledgeable about the content needed to give and customize a presentation that provides consistent information about how to prevent Medicare fraud and abuse, the next step is to make sure that you are prepared to speak to an audience, using effective presentation skills. Not all volunteers or even SMP staff will come to the program with the same level of presentation skill and experience. As you work with others in your SMP to complete your training and present group education sessions, you may benefit from partnering with another volunteer or SMP staff person to allow each of you to learn from one another.



In this chapter, we will review information to help you become more comfortable and effective when giving presentations and reporting back to your SMP.

## Be Prepared

Whether you are a novice or expert presenter, or somewhere in between, first and foremost, it's important to be adequately prepared for your presentation.

### Tips for Being Prepared

Here are some key ways to be prepared:

- **Know the presentation content**
  - If you are familiar with the SMP mission and comfortable with the presentation resources, your nervousness will decrease.
  - If you do not yet feel comfortable with the presentation content, review Chapter 1, the PowerPoint templates, and the *SMP Foundations Training Manual*.



#### Acronyms

The first time you mention an acronym, make sure you explain what it means! For example, if you mention the MSN, explain that it stands for "Medicare Summary Notice."

- **Know how to use your technology**

- Laptop

- If you are using a PowerPoint presentation, make sure you can find it on your computer.
- Make sure that your desktop wallpaper and screen saver are appropriate and that no other documents or programs are open.

- Projector

- If you are using a PowerPoint presentation, make sure that you know whose projector will be used and how to use it. Have an extra bulb available and know how to change it.
- Be aware of where you are standing in relation to the screen. Do stand next to the screen so that the audience can easily see both you and the screen at the same time. Don't block the screen, and don't point at the screen too often.

- Internet

- Determine in advance if you will have access to the Internet during your presentation and if you will want to use it to share SMP videos and/or other resources that are available online. If so, test your access before your presentation begins.

- Microphone

- Determine in advance if you will be using a microphone and if it will be hand-held or on a stand. If using one, test it out ahead of time and figure out the best place for it so that it won't get knocked over.

- Troubleshooting

- Try out all of your technology in advance and make sure it works! Consider focus and quality of images, screen height and size, lines of sight (i.e., pillars), etc.



### **Follow all SMP technology policies!**

Talk to your SMP director or coordinator of volunteers about what kind of hands-on training or other help is provided to prepare you to use the technology used by your SMP.



- Beware of cables and electrical cords on the floor.
- Be prepared in the event that any of your technology stops working. Have a printed backup copy of your presentation to use if needed.
- **Practice, Practice, Practice!**
  - Practice presenting until you are comfortable doing so without reading directly from your notes. It's ok to refer to your notes while you present, but if you are reading the entire presentation it will not be as effective for your audience or as fun for you.
  - Pay special attention to the first minute or two of your presentation, since the beginning of the presentation is the time that you will be the most likely to be nervous. Memorize the first few sentences and practice them until they come naturally, without effort.
  - If possible, record yourself or use a mirror and see for yourself how you do. Watching yourself give a presentation is a great way to see what you do well and what you can improve on.
  - You may have an opportunity to practice presenting as part of your SMP Group Education Training, as part of your on-the-job training with your SMP, or both. If you would like additional practice, talk with your SMP director or coordinator of volunteers.
- **Learn as much as you can about the audience**
  - Obtain information about the group in advance. Determine how many people are expected and what their backgrounds may be.
  - If possible, use a variety of methods to reach all learning styles (such as written, visual, oral, and action-based).
  - See Chapter 2 for more information about getting to know your audience.
- **Pay attention to the details**
  - Use the checklists referenced in Appendix B to prepare for your presentation.



- **Arrive early**
  - Increased stress from running late can add to your nervousness about presenting. Arriving early allows you to get settled in, figure out where restroom facilities and exits are located, and prepare to start on time.
  - Arriving early also gives you the opportunity to meet and greet. If possible, chat with audience members as they arrive – it is easier to speak to a group of friends than to a group of strangers.
- **Be at your best**
  - Plan your appearance. Dress comfortably and appropriately. Wear a name tag if one is provided by your SMP.
  - Rest up so that you are physically and psychologically alert.
- **Be prepared to handle the unexpected**
  - Have a backup plan for room or technical difficulties. If you have problems on the day of your presentation, stay calm and implement your backup plan.
  - Think about potential questions and prepare answers. We will talk more about answering questions later in this chapter.



**State and Local Information #10: Practice Makes Perfect!**

Will your SMP provide opportunities to practice giving SMP presentations as part of your training process? Ask your SMP director or coordinator of volunteers and make note here of their response:

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\_\_\_\_\_

\_\_\_\_\_



**Reduce Speech Anxiety**

Are you nervous about presenting to a group? The best way to reduce your speech anxiety is quite simply to **be prepared!**  
Read on for more tips to reduce nervousness.

### Tips to Reduce Nervousness

Here are some key ways to reduce nervousness related to speech anxiety:

- Learn to relax. Take a few breaths before you begin, pause, and go slowly with short sentences in your introduction.
- Make eye contact, if culturally appropriate. Pick one person in the audience to talk to for a few moments, then a different person. Talk to each individual as you look at him or her, instead of thinking about how many people are in the room.
- Realize that your audience will probably not recognize your fear.
- Recognize that audiences are approving and accepting – they want you to succeed.
- As we've mentioned previously, give special emphasis to the first minute or two (super-prepare).
- Imagine yourself as a good speaker (self-fulfilling prophecy).
- Identify your fears. Think about whether they are controllable or uncontrollable. Confront them when possible.
- Accept some fears as being good (energizing vs. destructive).
- Practice responses to tough situations.
- Concentrate on the SMP mission. Even if you don't know everything about Medicare fraud, errors, and abuse, by now you should be an expert on the SMP mission. Focus on what you do know instead of what you don't.
- Concentrate on the audience. Remember that you are there to help the audience by sharing important information with them. You are providing a service by helping them learn how to prevent becoming victims of Medicare fraud, errors, and abuse. If you encourage your audience to "pass it on," you are also helping anyone your audience shares this information with.



Ultimately, as you begin giving SMP group presentations, you will gain experience. Experience builds confidence, which is the key to effective speaking.

### State and Local Information #11: Bringing It All Together

The logistics of group education presentations vary greatly from one SMP to another. Discuss the processes related to presentations with your SMP director or coordinator of volunteers to learn how things work at your SMP. Use the Presentation Processes Checklist in Appendix B as a guide.

## Presentation Skills

Once you have prepared for your presentation, here are some things to keep in mind as you give your presentation. Effective presentation skills include both verbal and nonverbal delivery as well as engaging and properly managing your audience. These topics are covered in this chapter along with additional tips for an effective presentation.

### Verbal Delivery

- **Control Your Voice**

- **Volume:** Speak loudly enough that participants throughout the room can hear you. Use a microphone when necessary or available.
- **Tone:** The tone of your voice can signal a range of emotions. For example, increasing or decreasing tone may signal urgency. Make sure that your tone matches what you are saying, and maintain a steady, calm tone throughout your presentation.



- **Note:** Don't speak in a monotone! While it is important to control your tone of voice, your audience will likely become bored if you speak in the same tone through your entire presentation. Speak in a lively manner that shares your enthusiasm for the topic.
- **Speed and enunciation:** Speak slowly and clearly, placing an appropriate amount of emphasis on each word and pronouncing all words clearly. This will help ensure that your audience can clearly hear and understand what you say.

- **Avoid filler words**
  - Using filler words such as “er,” “ah,” “um,” “like,” and “y’know” can distract the audience from the message of the presentation. It is important, yet often challenging, to avoid filler words.
- **Don’t read your slides**
  - If you use a PowerPoint or handouts in your presentation, make sure that they contain a summary of the information you will cover – not everything you will say. Most people do not like to have information read to them.
  - Exception: If your audience is visually impaired, reading the slides may be helpful.



### How to Avoid Filler Words

Have a partner listen for filler words when you practice giving your presentation, and ask which filler words you are using, if any. Being aware of your use of filler words is a good first step toward reducing how often you use them. Another way to reduce or avoid filler words is to practice so that you are more comfortable with the information you are presenting.

## Nonverbal Delivery

The nonverbal portion of your delivery can be even more important than verbal delivery. Your body language says a lot about how you feel about the message you are conveying. Consider the “SOFTEN” approach for practical pointers on how to deliver your presentation.

- **Smile.** Be confident and enthusiastic – you are happy to be here. Your audience will feed off your energy. If you are passionate about your topic, your audience will be more interested in what you have to say.
- **Open posture.** You are friendly and relaxed. Maintain positive body language.
- **Forward lean.** You are going to say something interesting and important.
- **Territory.** You are alive! Move around. Don’t forget to let your personality show. If you are comfortable with yourself, the audience will be comfortable with you.



- **Eye contact.** Your audience is made up of individuals – make them feel like you are speaking directly with them. Don't stare at your notes excessively or look around the room. If culturally appropriate, look at individual people while you are speaking. This will help you connect with your audience and develop rapport, a very important element of a good presentation.
- **Nod head.** You are listening as well as speaking to the audience.

### Engage Your Audience

If you can keep your audience engaged, they are more likely to remember the information that you are sharing with them. It will also be a more enjoyable experience for everyone.

Here are some tips for keeping your audience engaged:

- Pay attention to your audience.
  - Are they comfortable?
  - Can they hear you?
    - Is a microphone available?
  - Can they see you and your visual aids?
    - Can you move around the room?
  - Are they responsive?
- Acknowledge what the audience is feeling.
  - Are they confused, frustrated, not engaged?
  - Have they made certain assumptions about you?
- Share something with your audience.
  - Find a common bond.
- Share your credentials.
  - Use personal or local stories to support your point.
- Find ways to interact.



## **Manage Your Audience**

How you choose to manage materials and take questions impacts how well you “manage” your audience and, in turn, manage the presentation itself.

### **Managing Materials**

If you are using handouts, determine in advance which handouts will be used and bring enough handouts for everyone in the audience. Also consider when and how the handouts will be provided to the audience. These choices can be driven by your level of experience as a presenter, including your ability to handle distractions from distributing handouts.

- Consider when you will provide the handouts.
  - Supplying materials in advance can distract participants who feel compelled to read while you talk.
  - On the other hand, it may be helpful for participants to have the materials while you talk because you can hold up each item and explain what it’s about.
- Consider the size of your audience.
  - In a small group you may be able to distribute materials yourself.
  - In a large group you may need to ask someone to help you.
- Consider how the room is arranged.
  - If participants are seated at tables, you can place handouts at each seat or place a supply of handouts on each table for people to pick up as they like.
  - If there are no tables, you can place handouts on each chair. However, it may be difficult for the audience to handle multiple handouts.
  - If a separate table is available for handouts, show each one during the presentation and let participants take what they like as they enter or leave.
- Reference the handouts during your presentation.
  - Explain what each handout is for and/or how to use it.
  - Point out highlights or key areas of interest for your audience.

### Managing Questions

Regardless of the length of your presentation, it's important to be prepared to answer questions. If you receive questions about your presentation that are directly related to the material you just presented, you may simply answer these questions based on your knowledge of your presentation. For example, an audience member could not hear a phrase and asks for it to be repeated or was confused and asks for clarification.

If you receive questions that are outside the scope of your presentation, however, additional training may be needed prior to answering these questions. SMP Counselor Training, for example, provides SMPs with the necessary skills and resources to answer SMP questions consistently across the country.

- If you have *not* completed SMP Counselor Training (or a similar training provided by your SMP), please send any questions that are outside the scope of your presentation to your SMP, using the tips on the following pages.
- If you *have* completed SMP Counselor Training, use the information you learned there in addition to these tips, which are geared toward questions that are received in a group setting.



#### Save the Questions

Until you are comfortable giving SMP group education presentations, you may prefer to save all questions to the end to ensure you can cover all your content. Once you become more familiar with SMP presentations, you may prefer to try different methods and see which work best for you and your audience.



### Set Yourself Up For Success

- Determine your method of handling questions before the presentation. Announce your expectations at the beginning of the presentation. For example:
  - “We will have a limited amount of time for questions today, so please save all questions to the end.”
  - “Please feel free to ask questions as we go.”
  - “If you have a question, please see me after the presentation. If I can’t answer it I will have our SMP staff follow up with you one-on-one.”
- Have a flip chart or paper ready to write down questions you cannot answer or special requests for information.
- If you will answer questions yourself, anticipate areas of questioning.
  - Prepare and practice the answers.
  - Review the SMP Counselor Training materials as needed.
- Anticipate the sharing of stories.
  - If time allows, stories can be shared with the group.
  - However, if time does not allow, ask the person to speak to you privately after the presentation or to contact the SMP directly.



### Answer Well

If you will answer questions as part of your presentation, keep these tips in mind:

- Listen carefully to the question and repeat it aloud.
- Answer directly.
  - Give simple answers to simple questions.
  - If the question demands a lengthy reply, agree to discuss it later with anyone interested.
  - Refer to your presentation whenever possible to reinforce and clarify your points.

- Always tell the truth. When in doubt, offer to follow up with the person later or have audience members call your SMP, SHIP, Medicare, their insurance provider, etc.

### Stay In Charge

During the question-and-answer session, be prepared to keep the discussion focused and the event on schedule.

- Be friendly.
  - Always keep an even temper, even if asked a question that you are unable to answer or that you disagree with.
  - Be aware of your body language and tone of voice. See the section on nonverbal delivery earlier in this chapter.
- Keep things moving.
  - There is a rhythm to a good question-and-answer exchange, with questions and answers flowing back and forth.
  - Consider and reference time limitations.
- Don't let a few people dominate.
  - Thank them for their comments/questions, suggest they speak with you afterward, and move on.
  - If necessary, interrupt the person who is dominating the discussion and say something like, "I'm going to jump in and facilitate here so we can cover all the information. I would be happy to discuss this more with you after the presentation."

### Wrap It Up

- Bring everyone's attention together at the end.
- Be prepared with some appropriate closing remarks.
- End with a summary statement that wraps up the essential message you want them to remember.



**State and Local Information #12: Questions**

How does your SMP expect volunteers to manage questions that are asked during group presentations? Discuss with your SMP director or coordinator of volunteers and take notes here.

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**General Tips for All Presentations**

- Respect participants' time. Start on time, and customize your presentation to the time allotted.
- Establish your credibility early.
- When culturally appropriate, use eye contact to establish rapport.
- Use your own style.
- Use your own words.
- Put yourself in the participants' shoes. They're asking, "What's in it for me?"
- Assume they are on your side.
- If you do not know something, say so. Let participants know you will find the answer. Get back to them when promised.
- Summarize key points.
- Mix it up. Over time, you may want to try a variety of presentation styles and formats (i.e., PowerPoint or not, types of interaction, etc.). This will teach you how different audiences or different settings lend themselves to each format and help you decide what is most effective.



**Additional Tips for Long Presentations**

- Get to know each other. Introduce yourself to the group in advance. Learn participants' names and use them. Acknowledge participants' experience.

- Interact with the audience. Most people have short attention spans. Interactive exercises help create opportunities for the audience to learn from each other. Incorporate activities such as Medicare fraud bingo and quick quiz questions to keep the audience attentive, interested, and involved. Don't be afraid to leave the podium; it may serve as a barrier between you and your audience.
- Let your audience share their experiences – within reason. As the presenter, your job is to keep the presentation “on track.” Allowing participants to share their stories is a good way to interact with your audience and keep their interest. Their stories may also serve as good examples of the points you are trying to make. Be aware of time and topic, though, and politely end the sharing when necessary.
- Use humor. People love to laugh. Humor can be a powerful tool in keeping your audience's attention and interest. Just make sure to use appropriate humor for your audience and your topic. Be aware of the cultures and backgrounds of audience members; do not use humor that might be offensive.



### **Additional Public Speaking Skills**

After completing this training, consider these options to further develop or improve your public speaking skills:

1. Shadow experienced public speaking staff and/or volunteers and observe them. Find out how they developed their techniques.
2. Pair up with a volunteer who has experience giving SMP group education presentations. Deliver part of a presentation and ask for his or her feedback afterwards.
3. Search the Internet for sites with free information.
4. Look for books, magazines, audio materials, or video materials at your local library.
5. Join a local Toastmasters group or other group that helps individuals develop and improve their public speaking skills.
6. Take a class at your local community college or other school.
7. Talk with your SMP director and/or coordinator of volunteers for additional suggestions.

## **Follow-up**

After each SMP group education presentation is over, several types of follow-up may be needed, including:

- Finding answers to remaining questions
- Completing paperwork

In this section we will look at information regarding these two types of follow-up. Please note that additional follow-up may be needed by your SMP.



### **Finding Answers to Questions**

All questions should be answered by someone at your SMP who is qualified to do so. If you have collected contact information from an audience member who needs follow-up, be sure to provide it to the appropriate person at your SMP as soon as possible.

If you have completed your SMP Counselor Training, refer to your training resources for information regarding following up on questions as needed.

#### **State and Local Information #13: Follow-up**

How should you follow up on questions at your SMP? Discuss with your SMP director or coordinator of volunteers and take notes here.

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## Completing Paperwork

Paperwork is important to SMPs for several reasons:

- It shows the media and the general public the hard work that is being done by the SMP to educate beneficiaries about how to prevent health care fraud.
- It helps support continued funding for the SMP program.
- It provides required information to the Office of Inspector General (OIG) and the Administration for Community Living (ACL).



As you learned in SMP Foundations Training, each year the OIG collects and analyzes data submitted by Senior Medicare Patrol programs on the activities and performance results of the program. This report, called the OIG report, includes data on outreach and education activities as well as other areas. Specifically in the area of group education presentations, the OIG report reflects:

- The number of group education sessions for beneficiaries, and
- The number of beneficiaries who attended group education sessions



### What's the Topic? Prevent Medicare Fraud and Abuse!

SMP can be the primary topic or a secondary topic in group education sessions. However, in order for a presentation to be considered an SMP group education session, it **must** provide information about how to prevent Medicare fraud and abuse.

SMPs use a national data reporting system to capture and report this data to the OIG. Additional information about group education sessions may be collected by your SMP for other tracking and reporting purposes (i.e., ACL reporting or other grant reporting).

Although reports to the OIG and ACL are required by all SMPs, the forms used for gathering reporting data and other logistics of the reporting process vary somewhat from one SMP to another. In addition to information about group education sessions, any hours worked by volunteers related to these sessions (including driving time, setup, etc.) are reported to the OIG. Be sure to complete and submit your volunteer time card or whatever method is used by your SMP to collect this data.

**State and Local Information #14: Paperwork**

Talk with your SMP director or coordinator of volunteers about expectations related to paperwork. Use this chart to take notes.

<b>Process</b>	<b>Who does it? (i.e., SMP staff, volunteer, partner, other, N/A)</b>
Provide form(s) to track group education sessions	
Provide form(s) to track volunteer hours	
Complete form(s) to track group education sessions	
Complete form(s) to track volunteer hours	
Submit completed paperwork to SMP	
Receive completed paperwork	
Enter data in the SMP data reporting system	

*Note: Separate data entry training is provided for those who will perform this task. Ask your coordinator of volunteers if your job will involve data entry and what additional training may be needed.*

**Are You Ready?**

Now that you have learned about SMP group education presentation content, customizing the presentation, and giving the presentation, talk with your SMP director or coordinator of volunteers about what you need to do to make sure you are ready to begin giving SMP presentations. Remember to use the checklists in Appendix B as a guide for what to do before, during, and after each presentation.







## SMP Group Education Training Manual

### Appendices

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## Appendix A: SMP Presentation Resources

Many resources for SMP presentations are available in the SMP Resource Library at [www.smpresource.org](http://www.smpresource.org). Resources include those developed nationally for SMPs and those developed by individual SMPs that can be used by other SMPs. Because resources are constantly being added, we cannot provide a complete listing of resources here. Search tips are provided below to help you find the resources you need.

### Accessing the SMP Resource Library

The SMP Resource Library is password-protected. The decision about who has permission to access the library is determined by the staff within your SMP. To request an account, contact your SMP director or coordinator of volunteers. If you will not be given access to the SMP Resource Library, you may want to ask if someone at your SMP can search the library on your behalf and send materials to you.

### Search Tips: Specific Resources

Here are some tips to help you find specific nationally developed resources referenced throughout this manual:

- **Group Education PowerPoint presentation templates** (electronic versions of Appendix C): Search for keywords “sample SMP presentations”
- **SMP Brochure:** Search for “national SMP brochure”
- **Personal Health Care Journal:** Search for keyword “PHCJ”
- **Fact Sheets:**
  - To find all fact sheets (including those developed by SMPs and those developed nationally), search for keywords “fact sheet”
  - To find national fact sheets developed by the SMP Resource Center, use the advanced search and select the “Origin” of “Center” and the “Type” of “Fact Sheet”. See the next page for tips on using the advanced search option.

### Search Tips: Advanced Search

Here are some tips to help you find resources related to SMP presentations, using the advanced search option in the SMP Resource Library:

- **Search Tip #1: Search by Origin**

The “Origin” field allows you to search for resources based on who developed them. You can find resources created by your own SMP, other SMPs, or by national SMP partners, including the National Hispanic SMP, SAGE (Services and Advocacy for Gay, Lesbian, Bisexual & Transgender Elders), IAIA (International Association for Indigenous Aging), and the Medicare Rights Center.

- **Search Tip #2: Search by Language**

The “Language” field allows you to search for resources in English, Spanish, or other languages.

- **Search Tip #3: Search by Intended Audience**

The “Intended Audience” field allows you to search for materials that are intended for a specific audience, such as those who are culturally diverse, those who have limited proficiency in English, or those who are visually impaired.

- **Search Tip #4: Search by Type of Resource**

The “Type” section allows you to search for specific resource types or formats, such as video, PowerPoint/Presentation, game, and script.

- **Search Tip #5: Search by Topic**

The “Topic” section allows you to search for specific topics, such as About SMP, Fraud/Abuse/Scams, and Medicare Summary Notice (MSN).

- **Search Tip #6: Search by Date Range**

The “Date Range” section allows you to search for resources that were added to the SMP Resource Library during a specific time period.

## Appendix B: SMP Group Education Checklists

### Presentation Processes Checklist

Use this checklist as a guide to talk with your SMP director and/or coordinator of volunteers about the processes at your SMP that apply to group education presentations. Use the spaces provided to write in the answers and any additional questions.

Topic	Questions	Answers
Scheduling Presentations and Follow-up	<ul style="list-style-type: none"> <li><input type="checkbox"/> Who schedules / sets up presentations?</li> <li><input type="checkbox"/> What is the process to send a reminder and/or confirm details with the organization hosting the presentation?</li> <li><input type="checkbox"/></li> </ul>	
Scheduling Presenters and Follow-up	<ul style="list-style-type: none"> <li><input type="checkbox"/> Who contacts volunteers to schedule them as presenters?</li> <li><input type="checkbox"/> What is the process, if any, to send a reminder and/or confirm details with the presenter?</li> <li><input type="checkbox"/> What steps should a presenter take if unable to give a presentation as scheduled?</li> <li><input type="checkbox"/></li> </ul>	
Giving the Presentation	<ul style="list-style-type: none"> <li><input type="checkbox"/> When giving the presentation, do volunteers work alone or partner with other volunteers or staff?</li> <li><input type="checkbox"/> Do volunteers answer questions or refer to SMP staff?</li> <li><input type="checkbox"/></li> </ul>	

*Presentation Processes Checklist, continued*

<b>Topic</b>	<b>Questions</b>	<b>Answers</b>
Policies and Guidelines	<ul style="list-style-type: none"> <li><input type="checkbox"/> Which policies and/or guidelines does your SMP have related to giving presentations? For example: How should you handle a situation in which you are presented with money or a gift following the presentation?</li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>	
Handouts	<ul style="list-style-type: none"> <li><input type="checkbox"/> Are the same printed reference materials/handouts used for every presentation or does it vary?</li> <li><input type="checkbox"/> Who decides which ones to use?</li> <li><input type="checkbox"/></li> </ul>	
Equipment	<ul style="list-style-type: none"> <li><input type="checkbox"/> Which equipment should be used (laptop, projector, flip chart, microphone, etc.)?</li> <li><input type="checkbox"/> Who decides this?</li> <li><input type="checkbox"/> How are presenters trained to use it?</li> <li><input type="checkbox"/></li> </ul>	
Supplies	<ul style="list-style-type: none"> <li><input type="checkbox"/> How do presenters get handouts, equipment, and supplies as needed?</li> <li><input type="checkbox"/></li> </ul>	
Evaluations	<ul style="list-style-type: none"> <li><input type="checkbox"/> Is a presentation evaluation used? If so, how are the surveys distributed and collected?</li> <li><input type="checkbox"/></li> </ul>	
Reporting	<ul style="list-style-type: none"> <li><input type="checkbox"/> How is presentation data reported to SMP staff?</li> <li><input type="checkbox"/> How are volunteer hours reported?</li> <li><input type="checkbox"/></li> </ul>	

### Preparation Checklist: Plan Ahead!

Use this checklist as a guide to plan for your group education presentations. Refer to the *SMP Group Education Training Manual* and/or meet with your SMP director or coordinator of volunteers as needed to prepare for each presentation.

#### Contacts

- Will this presentation be a standalone or are you partnering with another group?
- Is another volunteer or SMP staff person going with you?
- Make sure you have the contact information of those involved in the presentation.

#### Audience

- How many participants will attend?
- Who is your primary audience? Who is your secondary audience, if any?
- Who is your targeted beneficiary population?
- Is your audience a social or religious group? A professional organization?
- What is their knowledge and experience with Medicare, with the SMP program, and even with attending presentations?
- Why are they there? What's in it for them? Who asked them to be there? Who invited you to be there?
- What specific needs or issues should you address as the speaker?
- What do they expect to learn or hear from you? What do you want them to do after your presentation?
- How widespread is the coverage of the event? Is it local, regional, statewide?

## *Preparation Checklist, continued*

### **Location and Timing**

- Where will the presentation take place? Do you know how to get there? If you are not familiar with the location, get directions and take a map as well as the phone number of someone you can call if you get lost.
  
- How much time will you have to give your presentation? How much time will you have to answer questions? Plan to stay within the time limits.
  
- What time is the presentation scheduled to start? How early can you get there? Is it right before, after, or during a meal? Plan to arrive early to meet with any contact people and set up the room.
  
- If possible, plan to stay after the presentation. Some participants may want to talk one-on-one.

### **Facilities**

- Find out as much about the facilities as you can. If possible, check the facilities in advance to make sure that all of your audience's needs will be met.
  
- Will you be speaking in an auditorium or a small meeting room? Will you have any control over the lighting and temperature? Will you have access to a projector? Will you be able to rearrange the room?
  
- Determine the best way to set up the room for your presentation. Think about where you will stand so that participants will be able to see and hear you.
  
- Determine which equipment will be needed for your presentation (i.e., laptop, projector, etc.). Make sure that all equipment will be available for your use when needed and that you know how to set up and use the equipment.
  
- Determine a backup plan for room or technical difficulties.

### *Preparation Checklist, continued*

#### **Customize your Presentation**

- What is your primary topic? What is your secondary topic, if any?
- How will questions be addressed at the event?
- Select the appropriate PowerPoint template in Appendix C and make adjustments as needed based on your audience, topic(s), and other variables.

#### **Handouts and other Materials**

- Use the materials that are explained in the *SMP Group Education Training Manual* and/or those that are preferred by your SMP.
- Make sure that any materials you use in your presentation are relevant to the topic you are discussing, interesting to your audience, and easily accessible.
- Make sure that your materials are easy to read and that audience members will be able to understand them and use them (for example, if your audience may have low vision, use a larger font).
- Determine in advance how you will distribute handouts to the audience.
- What other supplies might you need (i.e., note cards for questions)?
- If possible, bring extra handouts for audience members who want to take copies to others who didn't attend the presentation or who may want a supply to leave at a community site.

#### **Practice Presenting**

- Make sure you know the presentation content well.
- Practice, practice, practice!
- For presentation tips, see Chapter 3 of the *SMP Group Education Training Manual* and/or the Presentation Checklist (on the following pages).



### Presentation Checklist: Today's the Day!

When the day of your event arrives, use this checklist as a guide to make sure you are organized and prepared for your group education presentation. Refer to the *SMP Group Education Training Manual* and/or meet with your SMP director or coordinator of volunteers as needed.

#### Items to Bring

- A copy of the confirmation letter, contact information, and directions to the facility
- A copy of your presentation and speaking notes (if you are using an electronic version, also bring a printed backup copy)
- Handouts and other program materials, including extra copies if available
- Note cards or paper for questions or requests
- Equipment, CDs, flash drive, videotapes, and transparencies, if applicable
- Evaluations, if applicable
- Name tag
- Other items?

#### Location and Timing

- Arrive at the site early.
- Introduce yourself to the site contact and review the agenda and expected speaking time.
- Greet the audience members as they arrive.
- If possible, plan to stay after the presentation. Some participants may want to talk one-on-one.

#### Facilities

- Rearrange the room as needed/allowed. Create an informal, relaxed setting, and ensure the presentation will be visible to all.
- If you will be using any equipment, make sure it is set up properly and try it to be sure it works well.
- Be sure the podium is sturdy, and test the microphone if you will be using one.
- Check the sound (volume and clarity) at both the front and back of the room.
- If you have problems on the day of your presentation, stay calm and implement your backup plan.

## *Presentation Checklist, continued*

### **Presenting**

- Consider both verbal and nonverbal delivery.
- Be aware of your volume, tone, speed, and enunciation. Avoid filler words such as “um.”
- Refer to your slides and/or notes, but don’t read directly from them.
- Use positive body language: Smile, maintain eye contact when appropriate, keep an open posture, move around the room, etc.
- Engage your audience by paying attention to their reactions and interacting with them when possible.
- Manage your audience by having a plan to provide handouts and by sharing your expectations regarding questions. Be prepared to defer stories if needed.
- Stay in charge and stick to your schedule.
- See Chapter 3 of the *SMP Group Education Training Manual* for additional presentation tips.

### **Handouts**

- Distribute handouts following the plan you have chosen.

### **Follow-up**

- Allow enough time at the end of the presentation for participants to fill out the evaluation, if applicable.
- Follow your plan to address questions or refer them to the SMP as needed.
- Report back to the SMP with information regarding the presentation.

### **Notes:**

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## Appendix C: SMP Group Education PowerPoint (PPT) Presentation Templates

### 10 Minute Presentation.....13 Slides

<b>Suggested Content: 10-minute presentation</b>	<b>Timing</b>
Consequences of Fraud, Errors, and Abuse	3 minutes
SMP Program	1 minute
Medicare Fraud and Abuse	3 minutes
Protect, Detect, Report	3 minutes

### 20 Minute Presentation.....17 Slides

<b>Suggested Content: 20-minute presentation</b>	<b>Timing</b>
Consequences of Fraud, Errors, and Abuse	4 minutes
SMP Program and Mission	2 minutes
Medicare Fraud and Abuse	3 minutes
Examples of Fraud and Abuse (stories)	2 minutes
Protect, Detect, Report	5 minutes
Volunteering with the SMP	1 minute
Q&A Session	3 minutes

### 30 Minute Presentation.....27 Slides

<b>Suggested Content: 30-minute presentation</b>	<b>Timing</b>
Consequences of Fraud, Errors, and Abuse	4 minutes
SMP Program and Mission	2 minutes
Medicare Overview	7 minutes
Medicare Fraud, Errors, and Abuse	4 minutes
Examples of Fraud and Abuse (stories)	2 minutes
Protect, Detect, Report	7 minutes
Volunteering with the SMP	1 minute
Q&A Session	3 minutes

*Note: For more information on PowerPoint templates, see Chapter 1 (Pages 9-11).*





# Take Charge... Help Prevent Health Care Fraud and Abuse!

Presented by: (Presenter name, SMP agency name, state)

Sponsored by: (Sponsor / partner)

Funded by: (grant / funding language)

## ***SMP Group Education PowerPoint Presentation, 10-minute version: Revised March 2015***

*Notes that are in italics are meant as notes to the facilitator, not to be read aloud. Notes that are not in italics are meant to be read with the slide.*

### **Editing Instructions**

*In each of the following fields with parentheses ( ), enter the applicable information to replace the parentheses and placeholder text, or remove text that is not applicable to your presentation.*

*(Your State) / (Sponsor/partner) / (Presenter name, SMP agency name) / (grant/funding language)*

### **Suggested Content & Timing: 10-minute presentation**

- *Consequences of Fraud, Errors, and Abuse: 3 minutes*
- *SMP Program: 1 minute*
- *Medicare Fraud and Abuse: 3 minutes*
- *Protect, Detect, Report: 3 minutes*

### **Tips**

- *If possible, have your partner organization introduce you.*
- *Do something creative to get the audience's attention right away, especially with shorter presentations. See the SMP Group Education Training Manual for suggestions and additional information.*

### **Suggested Script**

Thank you for allowing me to take a few minutes of your time. My name is (name) and I am here with the (State) Senior Medicare Patrol program. In today's presentation, I will talk to you about Medicare fraud and abuse, how they affect YOU, and how you can take charge to help prevent fraud and abuse in three easy steps: protect, detect, and report.



## Medicare Fraud, Errors, and Abuse Affect...

### Everyone

- ✓ **Billions** of taxpayer dollars lost to improper claims
- ✓ Medicare trust fund at risk

### Medicare Beneficiaries

- ✓ Higher premiums
- ✓ Less money for needed benefits
- ✓ Quality of treatment



2

### ***Suggested audience interaction to introduce this slide – ask the audience:***

How many of you are Medicare beneficiaries? *(raise hands)*

How many of you are caregivers? *(raise hands)*

How many of you pay taxes? *(raise hands)*

You might be wondering, why should I care about Medicare fraud? Well, Medicare fraud, errors, and abuse affect everyone!

- Each year, Medicare loses BILLIONS of taxpayer dollars to improper claims.
- This puts the Medicare trust fund at risk for everyone and affects the future of the Medicare program.

Medicare fraud, errors, and abuse also affect current Medicare beneficiaries because they result in higher Medicare premiums and waste money that could be used to increase and improve health care services.

## Consequences of Medicare Fraud, Errors, and Abuse



Medical identity theft



Health impact



Personal financial losses

3

Medicare fraud, errors, and abuse can also cause serious personal consequences for beneficiaries, such as medical identity theft, negative health impacts, and personal financial losses.

### Medical Identity Theft

Medical identity theft occurs when a beneficiary's Medicare number is misused, either by a provider, a supplier, or by someone posing as the real beneficiary in order to receive medical care. Such Medicare numbers are considered "compromised." Medicare numbers are for life, even if stolen or misused, so a beneficiary whose number is compromised may be affected forever by false claims against his or her Medicare number.

### Health Impact

Receiving health care from a fraudulent provider can mean the quality of the care is poor, the intervention is not medically necessary, or worse: The intervention is actually harmful. A beneficiary may later receive improper medical treatment from legitimate providers as a result of inaccurate medical records. Additionally, because of inaccurate or fraudulent claims to Medicare, beneficiaries may be denied needed Medicare benefits.

### Personal Financial Losses

Because Medicare numbers also contain Social Security numbers, financial fraud can be a side effect of having one's Medicare number compromised. Medicare numbers are as valuable as Social Security numbers to thieves who wish to set up credit card accounts with someone else's identity.

Also, there may be legal consequences for beneficiaries who are complicit in fraud and abuse, since participating in schemes to defraud Medicare is illegal!



## What is the Senior Medicare Patrol?

### SMPs...

Help Medicare beneficiaries prevent, detect, and report health care fraud

Help preserve the integrity of the Medicare program

Rely on volunteers to help perform SMP work

4

The Senior Medicare Patrol is here to help you avoid these problems.

Senior Medicare Patrol programs, or SMPs, help Medicare and Medicaid beneficiaries prevent, detect, and report health care fraud. By doing so, we help preserve the integrity of the Medicare and Medicaid programs. Because this work often requires face-to-face contact to be most effective, SMPs nationwide rely on approximately 5,000 volunteers who are active each year to help in this effort.

**Suggested Handout: SMP Brochure** (available in multiple languages)

[www.smpresource.org](http://www.smpresource.org) > Resources for SMPs > SMP Resource Library

## What is Medicare Fraud?



**Intentionally** billing Medicare for services that were not received or billing for a service at a higher rate than is actually justified

5

Now that we've learned a little bit about Medicare, let's look at Medicare fraud. Medicare fraud involves intentionally billing Medicare for services that were not received, or billing for a service at a higher rate than is actually justified.

## What is Medicare Abuse?



Providers supply services or products that are not medically necessary or that do not meet professional standards

6

Next, what is Medicare abuse?

Medicare abuse occurs when providers supply services or products that are not medically necessary or that do not meet professional standards. Medicare fraud and abuse are very similar and many times overlap.



## Examples of Fraud & Abuse

Billing for services, supplies, or equipment that were not provided

Billing for excessive medical supplies

Obtaining or giving a Medicare number for “free” services

Improper coding to obtain a higher payment

Unneeded or excessive x-rays and lab tests

Claims for services that are not medically necessary

Using another person’s Medicare number, or letting someone else use your number

7

Here are some examples of fraud and abuse:

- Billing for services, supplies, or equipment that were not provided
- Billing for excessive medical supplies
- Obtaining or giving Medicare number for “free” services; treat any offer of free services in exchange for your Medicare or health care identification number with caution
- Improper coding to obtain a higher payment
- Unneeded or excessive x-rays and lab tests
- Claims for services that are not medically necessary
- Using another person’s Medicare number, or letting someone else use your number, to obtain medical care, supplies, or equipment

## Three Steps to Prevent Health Care Fraud



**1) Protect**

**2) Detect**

**3) Report**

So, what can YOU do to take charge and help prevent Medicare fraud, errors, and abuse? I am here to tell you how in three easy steps: protect, detect, and report.



## Step 1: Protect Yourself and Others from Medicare Fraud

DO	DON'T
<ul style="list-style-type: none"> <li>Do treat your Medicare card and number like your credit card.</li> <li>Do watch out for identity theft.</li> <li>Do be aware that Medicare doesn't call or visit to sell you anything.</li> <li>Do be cautious of offers for "free" medical services.</li> <li>Do <b>pass it on!</b></li> </ul>	<ul style="list-style-type: none"> <li>Don't give out your Medicare number except to your doctor or other Medicare provider.</li> <li>Don't carry your Medicare card unless you will need it.</li> </ul>



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First, protect yourself and your loved ones from Medicare fraud and abuse!

- Do treat your Medicare and Social Security cards and numbers like your credit card. Don't give out your Medicare number except to your doctor or other Medicare provider. Don't carry your Medicare card unless you will need it. Only take it to doctors' appointments, visits to your hospital or clinic, or trips to the pharmacy.
- Do watch out for identity theft. Scam artists will not only use your Medicare number to defraud the Medicare system, but this is also one way that people can steal your identity, since your Social Security number is typically included in your Medicare number!
- Do be aware that Medicare doesn't call or visit to sell you anything. However, Medicare does now require their contractors to contact beneficiaries from time to time, so make sure to be vigilant. Keep in mind that you don't have to talk to anyone who calls you or shows up at your door who you do not trust... Medicare contractors will understand.
- Do be cautious of offers for "free" medical services. If it sounds too good to be true, it probably is!
- Do pass it on! Share this information with friends and family members who might not already know how to prevent Medicare fraud and abuse.



## Step 2: Detect Medicare Fraud & Abuse

- ✓ Use your **Personal Health Care Journal**
- ✓ Review **Medicare Summary Notices (MSNs)** and other statements for:
  1. Services you didn't receive
  2. Double-billing
  3. Services not ordered by your doctor
- ✓ Access your Medicare information at [www.MyMedicare.gov](http://www.MyMedicare.gov).



10

Second, detect Medicare fraud and abuse. Even when you do everything right, there is a chance that you could be a target of health care fraud. There are many ways that your personal information can be used without your permission.

- Record doctor visits, tests and procedures in your personal health care journal or calendar.
- Always review your Medicare Summary Notice and Explanation of Benefits for mistakes.
- Look for three things on your billing statements:
  1. Charges for something you didn't receive
  2. Billing for the same thing twice, and
  3. Services that were not ordered by your doctor
- Compare your Medicare Summary Notices and other statements to your personal health care journal and prescription drug receipts to make sure they are correct.
- Access to your current Medicare account is available 24 hours a day at [www.MyMedicare.gov](http://www.MyMedicare.gov).

### ***Suggested Handouts: MSN Fact Sheet and Personal Health Care Journal***

*Available in multiple languages at [www.smpresource.org](http://www.smpresource.org) > Resources for SMPs > SMP Resource Library*

## Step 3: Report Suspected Medicare Fraud and Abuse



- ✓ Call the provider.
- ✓ Gather information and documentation.
- ✓ **Contact your SMP.**
  - This is a free and confidential service!

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Third, if you detect or suspect fraud or abuse, report it. You will protect other people from becoming victims and help to save your Medicare benefits. To report your concerns:

- First, if you have questions about information on your Medicare Summary Notice (or MSN) or Explanation of Benefits (or EOB), call your provider or plan to find out if it was an error that they can correct without taking any further action.
- If you are not satisfied with the response you get or are not comfortable calling your provider or plan, gather all of the facts that you can about your situation.
- Make sure you have your MSN or EOB and any other supporting documentation that shows the possible fraud or abuse.
- Then, contact your SMP if you need help.
- Please keep in mind that services provided by your SMP are free and confidential.

## Three Steps to Prevent Health Care Fraud



**1) Protect**

**2) Detect**

**3) Report**

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Remember how YOU can take charge and help prevent Medicare fraud, errors, and abuse in three easy steps: protect, detect, and report! And remember to take what you know and “pass it on” to friends and loved ones who might not be as familiar with this information.



## Contact your State SMP: (Your SMP Name)

### Visit us online: (Your website)

- For more information

### Call Toll-free: (Your SMP phone #)

- To report suspected fraud/abuse
- For training, speakers, and/or materials
- To volunteer with the SMP program

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### ***Editing Instructions***

*In each of the following fields with parentheses ( ), enter the applicable information to replace the parentheses and placeholder text or remove text that is not applicable to your presentation.*

- (Your SMP Name)
- (Your website)
- (Your SMP phone#)

If you need to reach us at the (State) SMP, please visit us online or call us. Our contact information is provided on the screen and/or in the handouts.





# Take Charge... Help Prevent Health Care Fraud and Abuse!

Presented by: (Presenter name, SMP agency name, state)

Sponsored by: (Sponsor / partner)

Funded by: (grant / funding language)

## ***SMP Group Education PowerPoint Presentation, 20-minute version: Revised March 2015***

*Notes that are in italics are meant as notes to the facilitator, not to be read aloud. Notes that are not in italics are meant to be read with the slide.*

### **Editing Instructions**

*In each of the following fields with parentheses ( ), enter the applicable information to replace the parentheses and placeholder text, or remove text that is not applicable to your presentation.*

*(Your State) / (Sponsor/partner) / (Presenter name, SMP agency name) / (grant/funding language)*

### **Suggested Content & Timing: 20-minute presentation**

- *Consequences of Fraud, Errors, and Abuse: 4 minutes*
- *SMP Program and Mission: 2 minutes*
- *Medicare Fraud and Abuse: 3 minutes*
- *Examples of Fraud and Abuse (stories): 2 minutes*
- *Protect, Detect, Report: 5 minutes*
- *Volunteering with the SMP: 1 minute*
- *Q&A Session: 3 minutes*

### **Tips**

- *If possible, have your partner organization introduce you.*
- *Do something creative to get the audience's attention right away, especially with shorter presentations. See the SMP Group Education Training Manual for suggestions and additional information.*

### **Suggested Script**

Thank you for allowing me to take a few minutes of your time. My name is (name) and I am here with the (State) Senior Medicare Patrol program. In today's presentation, I will talk to you about Medicare fraud and abuse, how they affect YOU, and how you can take charge to help prevent fraud and abuse in three easy steps: protect, detect, and report.



## Medicare Fraud, Errors, and Abuse Affect...

### Everyone

- ✓ **Billions** of taxpayer dollars lost to improper claims
- ✓ Medicare trust fund at risk

### Medicare Beneficiaries

- ✓ Higher premiums
- ✓ Less money for needed benefits
- ✓ Quality of treatment



2

### ***Suggested audience interaction to introduce this slide – ask the audience:***

How many of you are Medicare beneficiaries? *(raise hands)*

How many of you are caregivers? *(raise hands)*

How many of you pay taxes? *(raise hands)*

You might be wondering, why should I care about Medicare fraud? Well, Medicare fraud, errors, and abuse affect everyone!

- Each year, Medicare loses BILLIONS of taxpayer dollars to improper claims.
- This puts the Medicare trust fund at risk for everyone and affects the future of the Medicare program.

Medicare fraud, errors, and abuse also affect current Medicare beneficiaries because they result in higher Medicare premiums and waste money that could be used to increase and improve health care services.



## Consequences of Medicare Fraud, Errors, and Abuse


Medical identity theft


Health impact


Personal financial losses

3

Medicare fraud, errors, and abuse can also cause serious personal consequences for beneficiaries, such as medical identity theft, negative health impacts, and personal financial losses.

### **Medical Identity Theft**

Medical identity theft occurs when a beneficiary's Medicare number is misused, either by a provider, a supplier, or by someone posing as the real beneficiary in order to receive medical care. Such Medicare numbers are considered "compromised." Medicare numbers are for life, even if stolen or misused, so a beneficiary whose number is compromised may be affected forever by false claims against his or her Medicare number.

### **Health Impact**

Receiving health care from a fraudulent provider can mean the quality of the care is poor, the intervention is not medically necessary, or worse: The intervention is actually harmful. A beneficiary may later receive improper medical treatment from legitimate providers as a result of inaccurate medical records that contain:

- False diagnoses
- Records showing treatments that never occurred
- Misinformation about allergies
- Incorrect lab results

Additionally, because of inaccurate or fraudulent claims to Medicare, beneficiaries may be denied needed Medicare benefits. For example, some products and services have limits. If Medicare thinks such products and services were already provided, they will deny payment.

### **Personal Financial Losses**

Medicare fraud, errors, and abuse can all result in higher out-of-pocket costs for beneficiaries, such as copayments for health care services that were never provided, were excessive, or were medically unnecessary. Beneficiaries may also find themselves stuck with bills for services from providers who should have billed Medicare but instead billed the beneficiary for the entire cost of that service. Finally, because Medicare numbers also contain Social Security numbers, financial fraud can be a side effect of having one's Medicare number compromised. Medicare numbers are as valuable as Social Security numbers to thieves who wish to set up credit card accounts with someone else's identity.

Also, there may be legal consequences for beneficiaries who are complicit in fraud and abuse, since participating in schemes to defraud Medicare is illegal!



## What is the Senior Medicare Patrol?

### SMPs...

Help Medicare beneficiaries prevent, detect, and report health care fraud

Help preserve the integrity of the Medicare program

Rely on volunteers to help perform SMP work

4

The Senior Medicare Patrol is here to help you avoid these problems.

Senior Medicare Patrol programs, or SMPs, help Medicare and Medicaid beneficiaries prevent, detect, and report health care fraud. By doing so, we help preserve the integrity of the Medicare and Medicaid programs. Because this work often requires face-to-face contact to be most effective, SMPs nationwide rely on approximately 5,000 volunteers who are active each year to help in this effort.

**Suggested Handout: SMP Brochure** (available in multiple languages)

[www.smpresource.org](http://www.smpresource.org) > Resources for SMPs > SMP Resource Library



## The SMP mission 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.**



Education and prevention are at the core of the Senior Medicare Patrol program, as demonstrated by its mission: *(read the slide)*

## What is Medicare Fraud?



**Intentionally** billing Medicare for services that were not received or billing for a service at a higher rate than is actually justified

6

Now that we've learned a little bit about Medicare, let's look at Medicare fraud. Medicare fraud involves intentionally billing Medicare for services that were not received, or billing for a service at a higher rate than is actually justified.

## What is Medicare Abuse?



Providers supply services or products that are not medically necessary or that do not meet professional standards

7

Next, what is Medicare abuse?

Medicare abuse occurs when providers supply services or products that are not medically necessary or that do not meet professional standards. Medicare fraud and abuse are very similar and many times overlap.



## Examples of Fraud & Abuse

Billing for services, supplies, or equipment that were not provided

Billing for excessive medical supplies

Obtaining or giving a Medicare number for “free” services

Improper coding to obtain a higher payment

Unneeded or excessive x-rays and lab tests

Claims for services that are not medically necessary

Using another person’s Medicare number, or letting someone else use your number

8

Here are some examples of fraud and abuse:

- Billing for services, supplies, or equipment that were not provided
- Billing for excessive medical supplies
- Obtaining or giving Medicare number for “free” services; treat any offer of free services in exchange for your Medicare or health care identification number with caution
- Improper coding to obtain a higher payment
- Unneeded or excessive x-rays and lab tests
- Claims for services that are not medically necessary
- Using another person’s Medicare number, or letting someone else use your number, to obtain medical care, supplies, or equipment



## Real Life Cases: Medicare Fraud & Abuse in (your state)!



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### ***Editing instructions***

*On this slide, be prepared to share one or two recent cases of fraud & abuse in your area. Discuss with your SMP director and/or coordinator of volunteers as needed to identify examples and write the script or talking points. If desired, delete (or shrink) the picture on this slide and type a few key words to remind you and your audience what the case is about.*

*In the (your state) field, enter your state name to replace the parentheses and placeholder text.*

## Three Steps to Prevent Health Care Fraud



**1) Protect**

**2) Detect**

**3) Report**

10

So, what can YOU do to take charge and help prevent Medicare fraud, errors, and abuse? I am here to tell you how in three easy steps: protect, detect, and report.



## Step 1: Protect Yourself and Others from Medicare Fraud

DO	DON'T
<ul style="list-style-type: none"> <li>Do treat your Medicare card and number like your credit card.</li> <li>Do watch out for identity theft.</li> <li>Do be aware that Medicare doesn't call or visit to sell you anything.</li> <li>Do be cautious of offers for "free" medical services.</li> <li>Do <b>pass it on!</b></li> </ul>	<ul style="list-style-type: none"> <li>Don't give out your Medicare number except to your doctor or other Medicare provider.</li> <li>Don't carry your Medicare card unless you will need it.</li> </ul>



11

First, protect yourself and your loved ones from Medicare fraud and abuse!

- Do treat your Medicare and Social Security cards and numbers like your credit card. Don't give out your Medicare number except to your doctor or other Medicare provider. Don't carry your Medicare card unless you will need it. Only take it to doctors' appointments, visits to your hospital or clinic, or trips to the pharmacy.
- Do watch out for identity theft. Scam artists will not only use your Medicare number to defraud the Medicare system, but this is also one way that people can steal your identity, since your Social Security number is typically included in your Medicare number!
- Do be aware that Medicare doesn't call or visit to sell you anything. However, Medicare does now require their contractors to contact beneficiaries from time to time, so make sure to be vigilant. Keep in mind that you don't have to talk to anyone who calls you or shows up at your door who you do not trust...Medicare contractors will understand.
- Do be cautious of offers for "free" medical services. If it sounds too good to be true, it probably is!
- Do pass it on! Share this information with friends and family members who might not already know how to prevent Medicare fraud and abuse.



## Step 2: Detect Medicare Fraud & Abuse

- ✓ Use your **Personal Health Care Journal**
- ✓ Review **Medicare Summary Notices (MSNs)** and other statements for:
  1. Services you didn't receive
  2. Double-billing
  3. Services not ordered by your doctor
- ✓ Access your Medicare information at [www.MyMedicare.gov](http://www.MyMedicare.gov).

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Second, detect Medicare fraud and abuse. Even when you do everything right, there is a chance that you could be a target of health care fraud. There are many ways that your personal information can be used without your permission.

- Record doctor visits, tests and procedures in your personal health care journal or calendar.
- Always review your Medicare Summary Notice and Explanation of Benefits for mistakes.
- Look for three things on your billing statements:
  1. Charges for something you didn't receive
  2. Billing for the same thing twice, and
  3. Services that were not ordered by your doctor
- Compare your Medicare Summary Notices and other statements to your personal health care journal and prescription drug receipts to make sure they are correct.
- Access to your current Medicare account is available 24 hours a day at [www.MyMedicare.gov](http://www.MyMedicare.gov).

### **Suggested Handouts: MSN Fact Sheet and Personal Health Care Journal**

Available in multiple languages at [www.smpresource.org](http://www.smpresource.org) > Resources for SMPs > SMP Resource Library

*Tip: If you have time, hand out the MSN Fact Sheet and/or Personal Health Care Journal (PHCJ) and review with the group. Explain how to use your MSN to detect fraud, errors, and abuse, and review the information to look for in each type of statement. Point out the instructions in the front of the PHCJ and explain how to use it to track health care visits and what types of questions to consider at each appointment.*

## Step 3: Report Suspected Medicare Fraud and Abuse



- ✓ Call the provider.
- ✓ Gather information and documentation.
- ✓ **Contact your SMP.**
  - This is a free and confidential service!

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Third, if you detect or suspect fraud or abuse, report it. You will protect other people from becoming victims and help to save your Medicare benefits. Here are the steps you should take to report your concerns:

- First, if you have questions about information on your Medicare Summary Notice (known as your MSN) or Explanation of Benefits (called an EOB), call your provider or plan to find out if it was an error that they can correct without taking any further action.
- If you are not satisfied with the response you get or are not comfortable calling your provider or plan, gather all of the facts that you can about your situation.
- Make sure you have your MSN or EOB and any other supporting documentation that shows the possible fraud or abuse.
- Then, contact your SMP if you need help.
- Please keep in mind that services provided by your SMP are free and confidential.

## Three Steps to Prevent Health Care Fraud



**1) Protect**

**2) Detect**

**3) Report**

Remember how YOU can take charge and help prevent Medicare fraud, errors, and abuse in three easy steps: protect, detect, and report! And remember to take what you know and “pass it on” to friends and loved ones who might not be as familiar with this information.



## SMP Volunteers



Help Medicare beneficiaries protect, detect, and report

Give presentations (like this one!)

Provide one-on-one counseling

Perform administrative work

15

**Join the SMP program as a volunteer!**

Now that you have learned how to prevent, detect, and report Medicare fraud, errors, and abuse, would you like to help other Medicare beneficiaries do so too? SMP volunteers, like ME, give group presentations like this one, provide one-on-one counseling to beneficiaries, perform administrative work, and more! If you would like to join the SMP program as a volunteer, please talk with me after this presentation or contact the local SMP.



## Contact your State SMP: (Your SMP Name)

### Visit us online: (Your website)

- For more information

### Call Toll-free: (Your SMP phone #)

- To report suspected fraud/abuse
- For training, speakers, and/or materials
- To volunteer with the SMP program

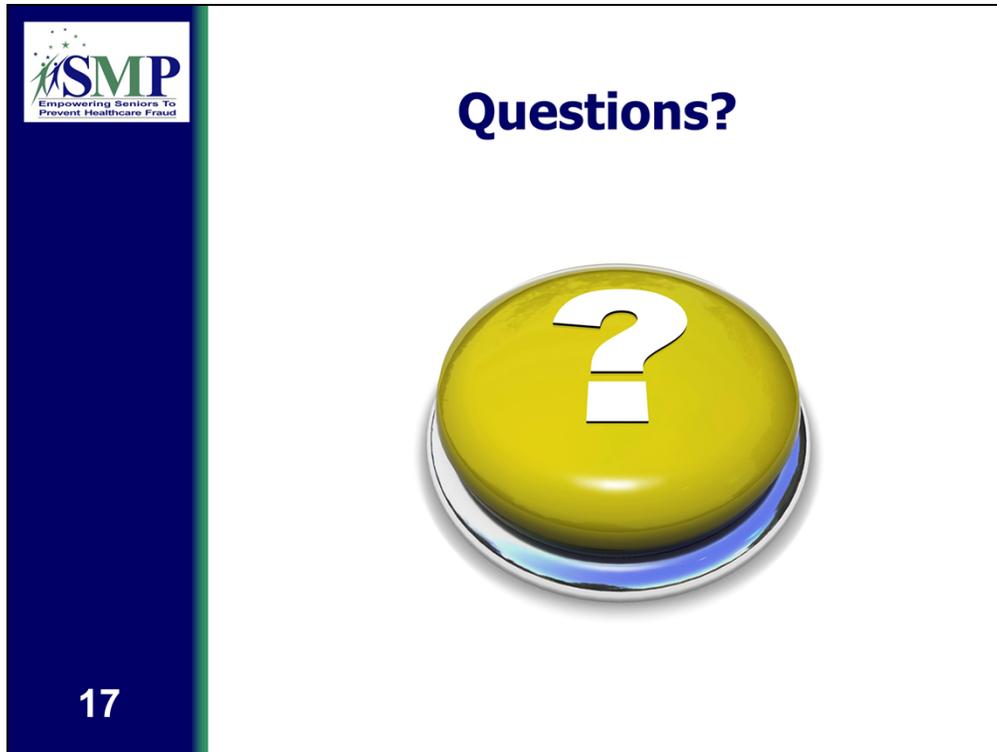
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### ***Editing Instructions***

*In each of the following fields with parentheses ( ), enter the applicable information to replace the parentheses and placeholder text or remove text that is not applicable to your presentation.*

- (Your SMP Name)
- (Your website)
- (Your SMP phone#)

If you need to reach us at the (State) SMP, please visit us online or call us. Our contact information is provided on the screen and/or in the handouts.



If any of you have questions, please ask them now or feel free to talk to me after the presentation.

*Answer questions or have your partner agency answer questions, as applicable; see the SMP Group Education Training Manual and/or SMP Counselor Training Manual for guidance during the Q&A session.*

I hope today's presentation has been useful in showing you how to take action to prevent Medicare fraud and abuse by taking three important steps.

1. Protect your Medicare number,
2. Detect fraud, errors, and abuse by reviewing your Medicare Summary Notices, and
3. Report any potential issues to your SMP.

Thank you for your time and for participating in this session!





# Take Charge... Help Prevent Health Care Fraud and Abuse!

Presented by: (Presenter name, SMP agency name, state)

Sponsored by: (Sponsor / partner)

Funded by: (grant / funding language)

## ***SMP Group Education PowerPoint Presentation, 30-minute version: Revised March 2015***

*Notes that are in italics are meant as notes to the facilitator, not to be read aloud. Notes that are not in italics are meant to be read with the slide.*

### **Editing Instructions**

*In each of the following fields with parentheses ( ), enter the applicable information to replace the parentheses and placeholder text, or remove text that is not applicable to your presentation.*

*(Your State) / (Sponsor/partner) / (Presenter name, SMP agency name) / (grant/funding language)*

### **Suggested Content & Timing: 30-minute presentation**

- *Consequences of Fraud, Errors, and Abuse: 4 minutes*
- *SMP Program and Mission: 2 minutes*
- *Medicare Overview: 7 minutes*
- *Medicare Fraud, Errors, and Abuse: 4 minutes*
- *Examples of Fraud and Abuse (stories): 2 minutes*
- *Protect, Detect, Report: 7 minutes*
- *Volunteering with the SMP: 1 minute*
- *Q&A Session: 3 minutes*

### **Tips**

- *If possible, have your partner organization introduce you.*
- *Do something creative to get the audience's attention right away, especially with shorter presentations. See the SMP Group Education Training Manual for suggestions and additional information.*

### **Suggested Script**

Thank you for allowing me to take a few minutes of your time. My name is (name) and I am here with the (State) Senior Medicare Patrol program. In today's presentation, I will talk to you about Medicare fraud and abuse, how they affect YOU, and how you can take charge to help prevent fraud and abuse in three easy steps: protect, detect, and report.



## Medicare Fraud, Errors, and Abuse Affect...

### Everyone

- ✓ **Billions** of taxpayer dollars lost to improper claims
- ✓ Medicare trust fund at risk

### Medicare Beneficiaries

- ✓ Higher premiums
- ✓ Less money for needed benefits
- ✓ Quality of treatment



2

### ***Suggested audience interaction to introduce this slide – ask the audience:***

How many of you are Medicare beneficiaries? *(raise hands)*

How many of you are caregivers? *(raise hands)*

How many of you pay taxes? *(raise hands)*

You might be wondering, why should I care about Medicare fraud? Well, Medicare fraud, errors, and abuse affect everyone!

- Each year, Medicare loses BILLIONS of taxpayer dollars to improper claims.
- This puts the Medicare trust fund at risk for everyone and affects the future of the Medicare program.

Medicare fraud, errors, and abuse also affect current Medicare beneficiaries because they result in higher Medicare premiums and waste money that could be used to increase and improve health care services.



## Consequences of Medicare Fraud, Errors, and Abuse



Medical identity theft



Health impact



Personal financial losses

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Medicare fraud, errors, and abuse can also cause serious personal consequences for beneficiaries, such as medical identity theft, negative health impacts, and personal financial losses.

### **Medical Identity Theft**

Medical identity theft occurs when a beneficiary's Medicare number is misused, either by a provider, a supplier, or by someone posing as the real beneficiary in order to receive medical care. Such Medicare numbers are considered "compromised." Medicare numbers are for life, even if stolen or misused, so a beneficiary whose number is compromised may be affected forever by false claims against his or her Medicare number.

### **Health Impact**

Receiving health care from a fraudulent provider can mean the quality of the care is poor, the intervention is not medically necessary, or worse: The intervention is actually harmful. A beneficiary may later receive improper medical treatment from legitimate providers as a result of inaccurate medical records that contain:

- False diagnoses
- Records showing treatments that never occurred
- Misinformation about allergies
- Incorrect lab results

Additionally, because of inaccurate or fraudulent claims to Medicare, beneficiaries may be denied needed Medicare benefits. For example, some products and services have limits. If Medicare thinks such products and services were already provided, they will deny payment.

### **Personal Financial Losses**

Medicare fraud, errors, and abuse can all result in higher out-of-pocket costs for beneficiaries, such as copayments for health care services that were never provided, were excessive, or were medically unnecessary. Beneficiaries may also find themselves stuck with bills for services from providers who should have billed Medicare but instead billed the beneficiary for the entire cost of that service. Finally, because Medicare numbers also contain Social Security numbers, financial fraud can be a side effect of having one's Medicare number compromised. Medicare numbers are as valuable as Social Security numbers to thieves who wish to set up credit card accounts with someone else's identity.

Also, there may be legal consequences for beneficiaries who are complicit in fraud and abuse, since participating in schemes to defraud Medicare is illegal!



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## What is the Senior Medicare Patrol?

SMPs...		
Help Medicare beneficiaries prevent, detect, and report health care fraud	Help preserve the integrity of the Medicare program	Rely on volunteers to help perform SMP work

The Senior Medicare Patrol is here to help you avoid these problems.

Senior Medicare Patrol programs, or SMPs, help Medicare and Medicaid beneficiaries prevent, detect, and report health care fraud. By doing so, we help preserve the integrity of the Medicare and Medicaid programs. Because this work often requires face-to-face contact to be most effective, SMPs nationwide rely on approximately 5,000 volunteers who are active each year to help in this effort.

**Suggested Handout: SMP Brochure** (available in multiple languages)

[www.smpresource.org](http://www.smpresource.org) > Resources for SMPs > SMP Resource Library



## The SMP mission 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.**



Education and prevention are at the core of the Senior Medicare Patrol program, as demonstrated by its mission: *(read the slide)*

## What is Medicare?



Federal health insurance program  
created in 1965



- People ages 65 and older
- Some people with disabilities under 65
- And a few others



Not designed to pay 100% of all  
medical bills



Covers over 52 million people

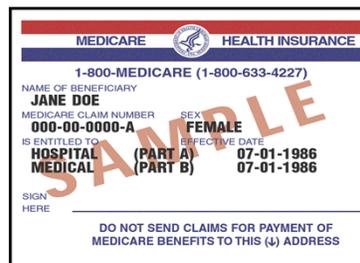
### What is Medicare?

Medicare is the federal health insurance program created in 1965 for people ages 65 and older, some people with disabilities under 65, and a few others, such as those with End-Stage Renal Disease (ESRD) and certain people with ALS (Lou Gehrig's disease or amyotrophic lateral sclerosis). The Medicare program was NOT designed to pay 100 percent of all medical bills. In 2013, according to the Medicare Trustees report, Medicare covered over 52 million people: 43.5 million people age 65 and older and 8.8 million people with disabilities.

## Medicare Numbers and Cards

All Medicare beneficiaries are issued a Medicare number and card upon enrollment.

Medicare numbers currently contain Social Security numbers. Because of this, a **Medicare number is as valuable to identity thieves as a credit card.**

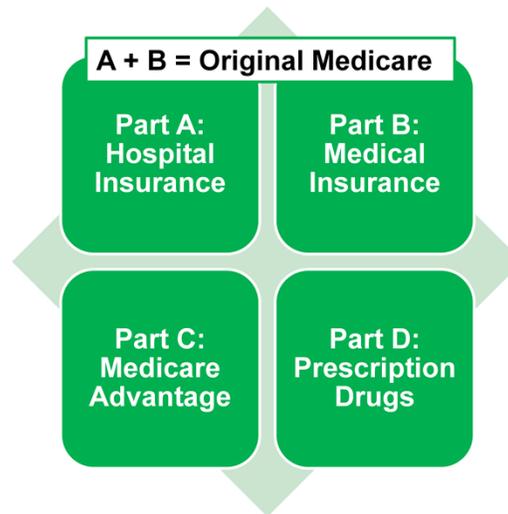


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Medicare beneficiaries are issued a Medicare number upon enrollment. Everyone enrolled in Medicare is also issued a Medicare card. It is then used like any other insurance card.

In most cases, Medicare numbers contain the beneficiary's Social Security number, making the Medicare number as valuable to identity thieves as a credit card.

## Parts of Medicare



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*Medicare Supplement Insurance (Medigap) is not part of Medicare*

Medicare consists of four parts called Part A, Part B, Part C, and Part D.

Medicare Part A and Part B together are known as "Original Medicare."

Beneficiaries in Original Medicare have the option of purchasing supplemental insurance to cover gaps in coverage. However, Medicare supplement insurance (also known as Medigap) is not part of Medicare.

Medicare Part C offers an alternate system for delivering the same services as Original Medicare through private insurance plans, called Medicare Advantage Plans.

Lastly, Medicare Part D insurance delivers prescription drug coverage through certain Medicare Advantage Plans or through standalone Medicare Prescription Drug Plans.

## Part A: Hospital Insurance

### Health care benefits help cover:

- ✓ Inpatient hospital care
- ✓ Inpatient skilled nursing facility care
- ✓ Home health care
- ✓ Hospice care



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Medicare Part A is also referred to as Hospital Insurance.

Part A provides health care benefits that help cover the following services:

- ✓ Inpatient hospital care
- ✓ Inpatient skilled nursing facility (SNF) care
- ✓ Home health care
- ✓ Hospice care

## Part B: Medical Insurance

### Health care benefits help cover:

- ✓ Doctor services
- ✓ Durable medical equipment (DME)
- ✓ Home health care
- ✓ X-rays, lab services
- ✓ Outpatient hospital services
- ✓ Mental health services
- ✓ Most preventive health care services



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Medicare Part B is also referred to as Medical Insurance.

Part B provides health care benefits that help cover the following services:

- ✓ Doctor services
- ✓ Durable medical equipment (DME)
- ✓ Home health care
- ✓ X-rays, lab services
- ✓ Outpatient hospital services
- ✓ Mental health services
- ✓ Most preventive health care services (“Welcome to Medicare” or yearly “Wellness” visits)

## Part C: Medicare Advantage

### An alternative to Original Medicare (Parts A and B) when elected

- ✓ Offered by private insurance companies
- ✓ Must provide all Part A and Part B benefits
- ✓ Many offer additional benefits
- ✓ Most include prescription drug coverage
- ✓ Coverage varies!



A plan comparison tool is available on Medicare's website: [www.Medicare.gov](http://www.Medicare.gov)

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Medicare Part C, more commonly called Medicare Advantage, is an alternative to Original Medicare when elected by a Medicare beneficiary. Medicare Advantage Plans are offered by private insurance companies that sign a contract with Medicare. Medicare Advantage Plans must provide all Medicare Part A and Part B benefits to plan members. Many offer benefits that Original Medicare doesn't cover, such as routine hearing, vision, and dental care and nonambulance medical transportation services. Most Medicare Advantage Plans also include Medicare Part D prescription drug coverage. Beneficiaries are encouraged to compare plans prior to enrolling because coverage varies. A plan comparison tool is available on Medicare's website: [www.Medicare.gov](http://www.Medicare.gov).

## Part D: Prescription Drugs



- ✓ Help with prescription drug costs
- ✓ Offered by private companies
- ✓ Coverage varies!

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A plan comparison tool is available on Medicare's website: [www.Medicare.gov](http://www.Medicare.gov)

Medicare Part D is also referred to as Medicare Prescription Drug Coverage. The Centers for Medicare & Medicaid Services (CMS) contracts with private companies to offer Medicare Prescription Drug Plans to people with Medicare.

Beneficiaries are encouraged to compare plans prior to enrolling because coverage varies. The drugs covered, copayment amounts, deductibles, and coverage in the gap or "donut hole" differ from plan to plan. A plan comparison tool is available on the Medicare website: [www.Medicare.gov](http://www.Medicare.gov).

## What is Medicare Fraud?



**Intentionally** billing Medicare for services that were not received or billing for a service at a higher rate than is actually justified

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Now that we've learned a little bit about Medicare, let's look at Medicare fraud. Medicare fraud involves intentionally billing Medicare for services that were not received, or billing for a service at a higher rate than is actually justified.

## What is Medicare Abuse?



Providers supply services or products that are not medically necessary or that do not meet professional standards

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Next, what is Medicare abuse?

Medicare abuse occurs when providers supply services or products that are not medically necessary or that do not meet professional standards. Medicare fraud and abuse are very similar and many times overlap.



## Examples of Fraud & Abuse

Billing for services, supplies, or equipment that were not provided

Billing for excessive medical supplies

Obtaining or giving a Medicare number for “free” services

Improper coding to obtain a higher payment

Unneeded or excessive x-rays and lab tests

Claims for services that are not medically necessary

Using another person’s Medicare number, or letting someone else use your number

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Here are some examples of fraud and abuse:

- Billing for services, supplies, or equipment that were not provided
- Billing for excessive medical supplies
- Obtaining or giving Medicare number for “free” services; treat any offer of free services in exchange for your Medicare or health care identification number with caution
- Improper coding to obtain a higher payment
- Unneeded or excessive x-rays and lab tests
- Claims for services that are not medically necessary
- Using another person’s Medicare number, or letting someone else use your number, to obtain medical care, supplies, or equipment

## What about Errors?

Health care services and billing are complicated, which can lead to errors.



Only a review and investigation of the issue will determine if it is an error, fraud, or abuse.

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In addition to fraud and abuse, it's also important to consider errors. Providing and billing for health care services involves many of complicated steps, which may lead to errors. Most Medicare payment errors are simply mistakes and are not the result of physicians, providers, or suppliers trying to take advantage of the Medicare system.

Sometimes what may seem like a simple error can turn out to be fraud or abuse, and what might appear to be fraud or abuse can be a simple error. Only a review and investigation of the issue will determine whether it is an error, fraud, or abuse.



## Real Life Cases: Medicare Fraud & Abuse in (your state)!



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### ***Editing instructions***

*On this slide, be prepared to share one or two recent cases of fraud & abuse in your area. Discuss with your SMP director and/or coordinator of volunteers as needed to identify examples and write the script or talking points. If desired, delete (or shrink) the picture on this slide and type a few key words to remind you and your audience what the case is about.*

*In the (your state) field, enter your state name to replace the parentheses and placeholder text.*

## Three Steps to Prevent Health Care Fraud



**1) Protect**

**2) Detect**

**3) Report**

So, what can YOU do to take charge and help prevent Medicare fraud, errors, and abuse? I am here to tell you how in three easy steps: protect, detect, and report.



## Step 1: Protect Yourself and Others from Medicare Fraud

DO	DON'T
<ul style="list-style-type: none"> <li>Do treat your Medicare card and number like your credit card.</li> <li>Do watch out for identity theft.</li> <li>Do be aware that Medicare doesn't call or visit to sell you anything.</li> <li>Do be cautious of offers for "free" medical services.</li> <li>Do <b>pass it on!</b></li> </ul>	<ul style="list-style-type: none"> <li>Don't give out your Medicare number except to your doctor or other Medicare provider.</li> <li>Don't carry your Medicare card unless you will need it.</li> </ul>



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First, protect yourself and your loved ones from Medicare fraud and abuse!

- Do treat your Medicare and Social Security cards and numbers like your credit card. Don't give out your Medicare number except to your doctor or other Medicare provider. Don't carry your Medicare card unless you will need it. Only take it to doctors' appointments, visits to your hospital or clinic, or trips to the pharmacy.
- Do watch out for identity theft. Scam artists will not only use your Medicare number to defraud the Medicare system, but this is also one way that people can steal your identity, since your Social Security number is typically included in your Medicare number!
- Do be aware that Medicare doesn't call or visit to sell you anything. However, Medicare does now require their contractors to contact beneficiaries from time to time, so make sure to be vigilant. Keep in mind that you don't have to talk to anyone who calls you or shows up at your door who you do not trust... Medicare contractors will understand.
- Do be cautious of offers for "free" medical services. If it sounds too good to be true, it probably is!
- Do pass it on! Share this information with friends and family members who might not already know how to prevent Medicare fraud and abuse.



## Step 2: Detect Medicare Fraud & Abuse

Review **Medicare Summary Notices (MSNs)** and other statements for:

1. Services you didn't receive
2. Double billing
3. Services not ordered by your doctor



20

Second, detect Medicare fraud and abuse:

Even when you do everything right, there is a chance that you could be a target of health care fraud. There are many ways that your personal information can be used without your permission.

- Always review your Medicare Summary Notice and Explanation of Benefits for mistakes.
- Look for three things on your billing statements:
  1. Charges for something you didn't receive
  2. Billing for the same thing twice, and
  3. Services that were not ordered by your doctor

**Suggested Handout: MSN Fact Sheet** (available in multiple languages)

[www.smpresource.org](http://www.smpresource.org) > Resources for SMPs > SMP Resource Library

*Tip: If you have time, hand out the MSN Fact Sheet and review it with the group. Explain how to use your MSN to detect fraud, errors, and abuse, and review the information to look for in each type of statement.*



## Step 2: Detect Medicare Fraud & Abuse, *continued*

Access your Medicare information online at [www.MyMedicare.gov](http://www.MyMedicare.gov).

- ✓ View recent MSNs
- ✓ Track claims made on your behalf
- ✓ Check payment status
- ✓ And more!



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Medicare Summary Notices are typically sent on a quarterly basis. To better detect potential issues, you can access your Medicare information online! [www.MyMedicare.gov](http://www.MyMedicare.gov) is a helpful tool for beneficiaries to view their most recent MSNs, track claims made on their behalf, and check payment status. Once you register, access to your current Medicare account is available 24 hours a day.

At MyMedicare.gov, you can also:

- Check Part B deductible status
- View eligibility information
- Track available preventive services
- Find Medicare health or prescription drug plans
- Access Part D plan claims information

MyMedicare.gov has the potential to serve as a valuable, real-time tool in combating fraud and abuse. If you have Medicare and access to a computer, this might be a good option for you.

## Step 2: Detect Medicare Fraud & Abuse, *continued*

### Use your **Personal Health Care Journal**

- ✓ Record doctor visits, tests, and procedures in this journal, and take it with you to your appointments.
- ✓ Ask yourself questions about your health care. Write the answers and other information in your journal.
- ✓ Compare your MSNs and other statements to your journal to make sure they are correct.



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Another way to help detect fraud, errors, and abuse is by using a Personal Health Care Journal.

- Record doctor visits, tests, and procedures in your personal health care journal and/or calendar, and take your journal with you to all of your appointments.
- Directions for using the Personal Health Care Journal are provided in the front of the journal and include a short list of questions you may want to ask yourself before your health care appointment. For example:
  - Is this appointment going to be covered by Medicare or my other insurance?
  - What are my symptoms? When did they start? What makes them better or worse?
  - What over-the-counter or prescription medications am I taking?
- Write down the answer to these questions, as well as what happens during your visit, in your journal.
- Later, compare your Medicare Summary Notices and other statements to your personal health care journal and prescription drug receipts to make sure they are correct.

### **Suggested Handout: Personal Health Care Journal** (Available in multiple languages)

[www.smpresource.org](http://www.smpresource.org) > Resources for SMPs > SMP Resource Library

*Tip: If you have time, hand out the Personal Health Care Journal and review it with the group. Point out the instructions in the front of the PHCJ and explain how to use it to track health care visits and what types of questions to consider at each appointment.*

## Step 3: Report Suspected Medicare Fraud and Abuse



- ✓ Call the provider.
- ✓ Gather information and documentation.
- ✓ **Contact your SMP.**
  - This is a free and confidential service!

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Third, if you detect or suspect fraud or abuse, report it. You will protect other people from becoming victims and help to save your Medicare benefits. Here are the steps you should take to report your concerns:

- First, if you have questions about information on your Medicare Summary Notice (known as your MSN) or Explanation of Benefits (called an EOB), call your provider or plan to find out if it was an error that they can correct without taking any further action.
- If you are not satisfied with the response you get or are not comfortable calling your provider or plan, gather all of the facts that you can about your situation.
- Make sure you have your MSN or EOB and any other supporting documentation that shows the possible fraud or abuse.
- Then, contact your SMP if you need help.
- Please keep in mind that services provided by your SMP are free and confidential.

## Three Steps to Prevent Health Care Fraud



**1) Protect**

**2) Detect**

**3) Report**

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Remember how YOU can take charge and help prevent Medicare fraud, errors, and abuse in three easy steps: protect, detect, and report! And remember to take what you know and “pass it on” to friends and loved ones who might not be as familiar with this information.



## SMP Volunteers



Help Medicare beneficiaries protect, detect, and report

Give presentations (like this one!)

Provide one-on-one counseling

Perform administrative work

25

**Join the SMP program as a volunteer!**

Now that you have learned how to prevent, detect, and report Medicare fraud, errors, and abuse, would you like to help other Medicare beneficiaries do so too? SMP volunteers, like ME, give group presentations like this one, provide one-on-one counseling to beneficiaries, perform administrative work, and more! If you would like to join the SMP program as a volunteer, please talk with me after this presentation or contact the local SMP.



## Contact your State SMP: (Your SMP Name)

### Visit us online: (Your website)

- For more information

### Call Toll-free: (Your SMP phone #)

- To report suspected fraud/abuse
- For training, speakers, and/or materials
- To volunteer with the SMP program

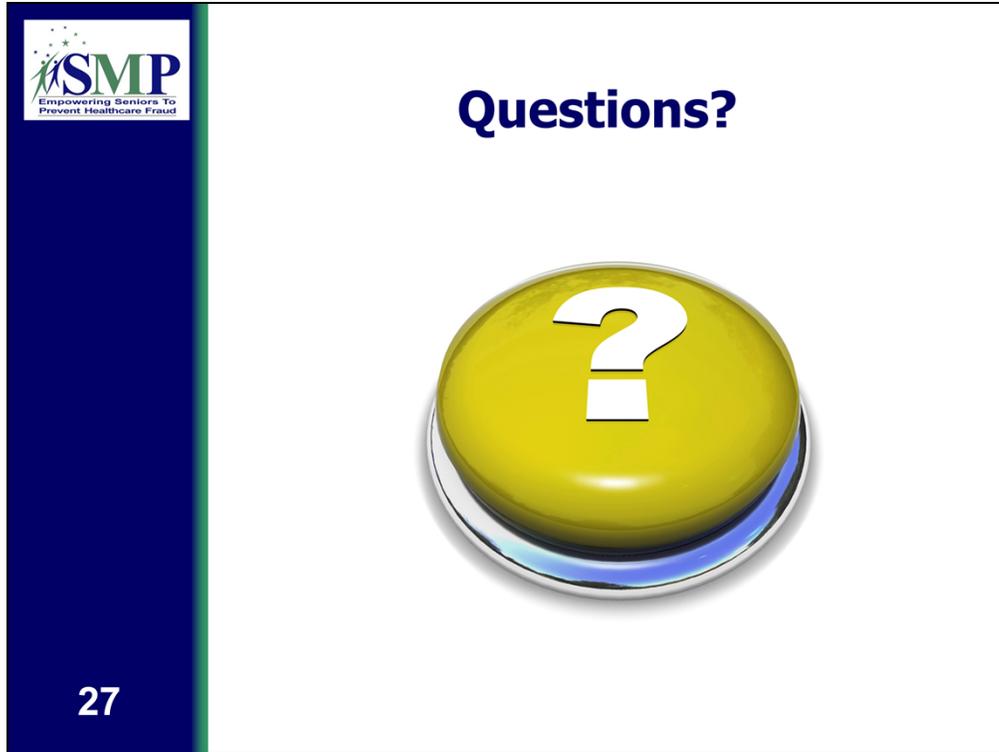
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- (Your SMP Name)
- (Your website)
- (Your SMP phone#)

If you need to reach us at the (State) SMP, please visit us online or call us. Our contact information is provided on the screen and/or in the handouts.



If any of you have questions, please ask them now or feel free to talk to me after the presentation.

*Answer questions or have your partner agency answer questions, as applicable; see the SMP Group Education Training Manual and/or SMP Counselor Training Manual for guidance during the Q&A session.*

I hope today's presentation has been useful in showing you how to take action to prevent Medicare fraud and abuse by taking three important steps.

1. Protect your Medicare number,
2. Detect fraud, errors, and abuse by reviewing your Medicare Summary Notices, and
3. Report any potential issues to your SMP.

Thank you for your time and for participating in this session!



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