

Idaho Senior Health Insurance Benefits Advisors (SHIBA) Volunteer Portal Project
An Information Technology Initiative of the Idaho Department of Insurance

Category: Information Communications Technology (ICT) Innovations

Contact: Becky Barton-Wagner

IT Resource Manager, Idaho Department of Insurance

Becky.Barton@doi.idaho.gov

208-334-4279

State: Idaho

Project initiation: August, 2010

Project completion: July 2014

Executive Summary

The Idaho SHIBA Volunteer Portal Project (SVPP), which was started in August 2010 and completed in July of 2014, has profoundly affected the Idaho SHIBA and Senior Medicare Patrol (SMP) programs' ability to efficiently and effectively deliver Medicare support services throughout Idaho.

Prior to the SVPP, reporting functions were completed manually using paper forms. In calendar year 2010 SHIBA processed 12,115 paper Client Contact Forms (CCFs). Records maintenance and compliance monitoring were neglected due to the sheer volume of data entry required. Forms were sometimes not submitted or were misplaced. Similar problems existed for volunteer mileage reimbursement payments, calendar management, call center appointments, recordkeeping for the volunteers' data, and more.

The SVPP has created solutions to solve many of these problems:

- The CCF direct-entry system allows volunteers to enter CCFs and timesheets online for timely, accurate and effective reporting and data management. Since its implementation, approximately 4,800 staff hours previously used for data entry were instead used for program delivery and servicing Medicare beneficiaries.
- Counseling and event calendars, and an outreach tool allow volunteers to be scheduled and verify appointments independently, centralizing the calendars and maintenance and greatly improving communication.
- Mileage reimbursement has gone from 25 hours of effort each month, to 2 hours total. Errors have been reduced, and payments are made in a timelier manner.
- Batch uploading and flagging of CCFs ensures SHIBA and SMP reporting to funding agencies is current and accurate. Volunteers are able to help with the workload.
- Automated processes for maintaining records, reporting to state and federal agencies, compliance monitoring, performance assessment, outreach tracking and program management allow review, analysis and reporting to take hours, rather than days, of effort.
- Matching citizens to counseling sites over the phone is efficient and more accurate.

Overall, the SVPP has allowed the SHIBA/SMP to centralize efforts, improve efficiency and use personnel to expand and improve service delivery to the Medicare beneficiaries of Idaho.

Business Problem and Solution Description

The Idaho SHIBA Volunteer Portal Project (SVPP), which was started in August 2010 and completed in July of 2014, has profoundly affected the Idaho SHIBA and Senior Medicare Patrol (SMP) programs' ability to efficiently and effectively deliver Medicare support services throughout Idaho.

Idaho SHIBA is Idaho's State Health Insurance Assistance Program (SHIP). In conjunction with the SMP of the Idaho Commission on Aging (ICOA), SHIBA provides Medicare resources, workshops, benefits counseling, and fraud education and reporting to the citizens of Idaho. The Idaho SHIBA and SMP organizations consist of paid staff and volunteers throughout Idaho. The program's service is supported by an average of 150 volunteers and staff at more than 80 counseling sites. Both agencies are responsible for sending daily activity and periodic reports to the Administration for Community Living (ACL), the federal agency that provides program funding.

Prior to the SVPP, reporting functions were completed manually using paper forms. In calendar year 2010 SHIBA processed 12,115 Client Contact Forms (CCFs) printed on paper, mailed or faxed to SHIBA and SMP offices, then entered into the computers by paid staff. Records maintenance and compliance monitoring were neglected due to the sheer volume of data entry required. Forms were sometimes not submitted or were misplaced. Similar problems existed for volunteer mileage reimbursement payments, calendar management, recordkeeping for the volunteers' data, and more.

The SVPP has created solutions to solve many of these problems:

- The CCF direct-entry system allows volunteers to enter CCFs and timesheets online for timely, accurate and effective reporting and data management.
- Counseling and event calendars, and an outreach tool allow volunteers to be scheduled and verify appointments independently, centralizing the calendars and maintenance and greatly improving communication
- The mileage reimbursement process has been greatly simplified, reducing both the time required and the possibility for error. Redundancies have been eliminated and payments are made in a timelier manner, which the volunteers appreciate.
- Batch uploading and flagging of CCFs ensures SHIBA and SMP reporting to the federal funding agency is current and accurate.
- Automated processes for maintaining records, reporting to state and federal agencies, compliance monitoring, performance assessment, outreach tracking and

program management allow review, analysis and reporting to take hours, rather than days, of effort.

- Matching citizens to counseling sites over the phone is efficient and more accurate than previously.

Significance

The SVPP has had a considerable impact on our staff and our volunteers, as well as benefitting the federal agencies to which we report for our funding.

SHIBA staff have saved, since the project's implementation, approximately 4,800 staff hours previously used for data entry relating to just the CCFs. The process of mileage reimbursement cuts across sections of the agency, impacting not only SHIBA staff, but also top management and multiple employees in the fiscal section, and that process has gone from 25 hours of effort for 12 SHIBA, fiscal and managerial staff each month, to 2 hours total for 6 staff. Combined, the improvements have saved the program 4,800 paid staff hours per year, for a total payroll savings of over \$70,000. Time saved allows staff to focus efforts on accomplishing the mission of our SHIBA section: providing program delivery servicing Medicare beneficiaries across Idaho.

The quality of service provided by our staff has also improved. Through an enhanced state map marked with the locations of all of the counseling sites, we've been able to matchup callers to our 1-800 number with the counseling site(s) nearest to them. With our scheduling calendar, it's become a quicker, easier process to get the people who need our service coordinated with those who can provide them with help.

At a supervisory level, having all of this information in a centralized database with reporting features associated with it has given us the ability to perform statistical and data analysis previously impossible. We've been able to determine trends in service delivery and spot potential patterns of problems that we can correct through training and the efforts of our coordinators.

From the volunteer point of view, the SVPP has been an invaluable communications tool. Automating the CCFs (with easy dropdowns and simple, consistent reporting) has made it easier to keep track of their efforts and prevent duplication or missed entries. With improvements to the mileage reimbursement process, volunteers are receiving their payments nearly a month earlier than they used to, which is also a welcome and appreciated improvement. A centralized one-stop-shop for their training needs is yet another way that the SVPP is of use and value to our volunteers, and now includes all of the requisite training materials to study for, qualify, and receive certification to be a SHIBA Volunteer all directly through the SVPP.

Benefits of the Project

Numerous advantages have been realized with the completion of the SVPP.

- Since its implementation, approximately 4,800 staff hours previously used for data entry relating to just the CCFs have instead been used for program delivery and servicing Medicare beneficiaries across Idaho.
- Mailing and faxing costs associated with sending in paper CCFs have been eliminated by the SVPP.
- Part-time staff are able to utilize a web-based state map and the event calendar tool to match citizens in need of counseling with the best available location and appointment time with ease.
- Mileage reimbursement has gone from 25 hours of effort for 12 SHIBA, fiscal and managerial staff each month, to 2 hours total for 6 staff.
- Volunteers are able to help with part of the workload associated with the batch upload process to the federal funding agency, further reducing the burden on paid staff and allowing us to put our full effort into delivering services.
- Automated processes for maintaining records, reporting to state and federal agencies, compliance monitoring, performance assessment, outreach tracking and program management allow review, analysis and reporting to take hours, rather than days, of effort.
- Call center staff are able to look at an enhanced SHIBA map (built on the State of Idaho's GIS infrastructure) showing all counseling sites and easily match up a potential client (calling into our office) to the location most convenient for them, complete with location contacts. Connecting the client to the most accessible volunteer has never been easier.
- All of the training material required to obtain certification as a SHIBA counselor is available through the SVPP. Prospective volunteers can sign up, study for, and even take the examination online through the SVPP, receiving their certification in a timely manner without having to travel to multiple sites and manage multiple logins.

Overall the improvements provided by the creation of the SVPP have allowed SHIBA staff and volunteers to utilize their limited resources more effectively. Volunteers have the ability to access the CCF entry from their counseling sites, sometimes minutes after meeting with a client. This eliminates the lag-time between the counseling and the data entry. The online volunteer training through the portal has significantly reduced in-person training time and volunteers are completing certification with strong

understanding of the required content. The streamlined counseling calendar means staff from any of the three offices can schedule appointments and tell clients about upcoming classes and events. The SVPP provides the SHIBA and SMP programs with tools which enhance staff and volunteer effectiveness and thus client experience, while also providing consistency and efficiency to the programs.