

MODULE 14: NYSOFA HIICAP REPORTING

The Centers for Medicare & Medicaid Services (CMS), its contractor, American Institute for Research (AIR) and the SHIP Steering Committee/Performance Assessment Workgroup developed a system to collect and compile data about the activities of the SHIP (HIICAP) programs known as National Performance Reporting (NPR).

Reporting Mandate

Compliance with the reporting requirement is a term and condition of each Area Agency on Aging or its subcontractor who receives a HIICAP grant award. CMS requires State Health Insurance Programs (SHIPs) to use the National Performance Reporting (NPR) System. HIICAP reporting is web-based and secure. Shiptalk and NYSOFA provide technical assistance to area agencies as needed via training, manuals, online help and phone contact.

***Please share copies of this module with Area Agencies on Aging and/or subcontractors who are directly responsible for completing HIICAP reporting requirements.**

Quality Data

Be sure to report accurate data by checking your entries before submitting them.

- 1) Provides local, state, and national sponsors with statistics to justify continued support
- 2) Documents the valuable services that you have performed, and
- 3) Helps to maintain the highest quality of services. **Continued funding for this program is contingent upon accurate, quality data.**

Web site for Counselors: <https://shipnpr.shiptalk.org>

Each individual HIICAP Coordinator, Counselor, Volunteer, Subcontractor, or MCCAP Agency who will be entering data must register on the site and select their own unique username and password. The State Office for the Aging will receive an email request to approve your access to the site. Please accurately reflect the Area Agency on Aging or Medicare Consumer Advocacy Project you are representing.

Use this site to sign in and enter client data from the Client Contact Form and the Public and Media Form. Each local HIICAP counselor should use the hard copies of these forms in order to ensure accurate reporting and back-up data. The 'Client Contact Form' (CC) and 'Public and Media Activity Form' (PAM) should be printed and provided to each counselor so that they can record each client contact and counseling session as well as every public and media event. This information is then entered into the online Reporting System. These forms are available as a PDF file on Shiptalk.org.

Monitoring Data

NYSOFA can access and monitor your data. Set a specific time aside each day/week to enter data so that you don't fall behind in recording your information. **Don't wait until the reports are due. Maintaining accurate records is very important.**

REPORTING

The National Performance Report (NPR) consists of:

1. Client Contact Form (CC)
2. Public and Media Activity Form (PAM), and
3. Resource Report, which captures all of the resources (HIICAP and non-HIICAP funded) that have been used to assist people with Medicare.

HIICAP Reporting Forms

- The **Client Contact Form (CC)** records all client contacts -- contacts can be made over the phone, in person at the office or in a home, via postal mail, e-mail or a fax transmittal. Enter all client data into the web-based system – <https://shipnpr.shiptalk.org> under the CC tab.
- **Public & Media Activity Form (PAM)** – The PAM captures the type and number of media activities -- radio and television shows, presentations, newsletters, etc., as well as the topics covered and their target audiences. To input data access the national system at: <https://shipnpr.shiptalk.org> under the PAM tab.
- **Resource Report – Now Annual – Due May 15th annually.** The Resource Report captures all of the resources (HIICAP and non-HIICAP funded) that have been used to assist people with Medicare. Information is reported to the New York State Office for the Aging via Linda Petrosino on an annual basis via postal mail, e-mail or fax at (518) 486-2225. **Do not enter this information on the shiptalk website.**

Note: The Resource Report was previously due on a semi-annual basis. It is recommended that HIICAP programs and MCAP agencies continue to track resources on a semi-annual basis in order to ensure submission of complete and accurate annual data.

It is important to obtain all data and complete each section of the forms for input into Shiptalk.

Reporting MIPPA in Shiptalk

HIICAP programs, ADRC programs and MCAP agencies should use the NPR Client Contact Forms and Public & Media Activity Forms to record data in Shiptalk about counseling and events related to MIPPA.

In general, because MIPPA involves outreach and counseling to lower-income beneficiaries, the reporting under MIPPA will be related to LIS, MSP and other low-income outreach and counseling efforts.

For an illustration of MIPPA reporting in Shiptalk, please see the document entitled ‘Technical Assistance for SHIP use of National Performance Reporting (NPR) Forms and Shiptalk for MIPPA Reporting Purposes’ at the end of this Module.

All HIICAP programs and MCAP Agencies are required to:

- a). Input both HIICAP Client Contact data and Public and Media events information via Shiptalk; a Web-based secure site; and
- b). Send Resource Report data via e-mail, postal mail or hard-copy paper format as required each year.

THE FOLLOWING PROVIDES AN OVERVIEW OF THE REPORTING PERIODS

Client Contact & Public & Media Forms

The quarterly reporting periods for the *Client Contact Form and Public and Media Activity Form* are:

Timetable	Must be entered via Shiptalk.org by:
1st quarter (April 1, 2012 – June 30, 2012)	July 31, 2012
2nd quarter (July 1, 2012 – September 30, 2012)	October 31, 2012
3rd quarter (October 1, 2012 – December 31, 2012)	January 30, 2013
4th quarter (January 1, 2013 – March 31, 2013)	April 30, 2013

Resource Report

The *Resource Report* is submitted **annually**. The annual reporting period for the Resource Report Form is April 1, 2012 to March 31, 2013. Forms must be mailed, emailed or faxed to the State Office by May 15, 2013.

For all reports, NYSOFA provides ample notice and reminders when reports are due.

You can find Web and Data Technical Support as noted below: This includes contact information if you have trouble accessing the Web site: <https://shipnpr.shiptalk.org>.

Technical Support

American Institute for Research
 Voice: 1-800-253-7154
ShipNPRHelp@air.org

Questions about forms and instructions or how to enter data?

Contact: Linda Petrosino at linda.petrosino@ofa.state.ny.us or by phone (518) 408-1696.

**Medicare Improvements for Patients and Providers Act (MIPPA) Reporting
 (*separate from Shiptalk reporting)**

MIPPA data includes the aggregate count of Low Income Subsidy (LIS) program and Medicare Savings Program (MSP) applications that are completed and submitted to the appropriate agency. LIS applications are submitted to the Social Security Administration and MSP applications are submitted to the Local Department of Social Services. Any assistance provided to clients in completing and submitting LIS and MSP recertifications is also included in the MIPPA count.

In some cases you may not actually submit an application for a client, but if you reasonably believe that a client you assisted by telephone, in person, etc., submitted the application, you may include this in the MIPPA count. For example, you met with client, calculated income eligibility and completed application, but client wanted to have documents reviewed by a caregiver, you would

count this. The general rule is that you have “every reason to believe” that the client applied for the LIS or MSP at the end of your meeting.

*Do not include general inquiries regarding LIS and MSP in the MIPPA count.

The New York State Office for the Aging is responsible for collecting MIPPA data from its HIICAP programs, ADRC programs and MCAP agencies in order to submit it into the National Center for Benefits Outreach and Enrollment reporting tool. Reports are required on a quarterly basis as follows:

Period Covered	Due Date
April 1- June 30, 2012	July 31, 2012
July 1 – September 30, 2012	October 31, 2012

Note Year 2 of MIPPA funding ends September 30, 2012. At the time of this printing, it is not expected funding for the MIPPA program will continue.

For all reports, NYSOFA provides ample notice and reminders when reports are due.

Reporting should be submitted to NYSOFA in terms of:

LIS applications: _____

MSP applications: _____

Other client contacts and outreach under MIPPA is reported via client contact and public and media forms on Shiptalk as described in the document entitled ‘Technical Assistance for SHIP use of National Performance Reporting (NPR) Forms and Shiptalk for MIPPA Reporting Purposes’ at the end of this Module.

Thank You for Reporting!!

TECHNICAL ASSISTANCE FOR SHIP USE OF NATIONAL PERFORMANCE REPORTING (NPR) FORMS AND SHIPTALK FOR MIPPA REPORTING PURPOSES

This guidance is for states that are using the NEW NPR forms and reporting system.

Data collected through SHIPTalk covers only the activities conducted by the SHIPs. SHIP numbers need to be added to the numbers collected by Area Agencies on Aging (AAA) and Aging and Disability Resource Centers (ADRC) in your state in order to get the total number of individuals assisted with applications and activities conducted statewide under the three funding streams of MIPPA that become your single state report.

SHIP CLIENT CONTACT FORM

SHIPs may choose to use the SHIPTalk/NPR system to collect data on the individuals assisted under the purview of the MIPPA grant. If your state decides to do so, you will need to use the Client Contact Form to collect data on application assistance provided to individuals for the Medicare Part D Extra Help/Low-Income Subsidy (LIS) and Medicare Savings Programs (MSP).

There have been some important changes to the Client Contact Form that should make it easier for you for collect data on clients whom you assist through your MIPPA grant work. There are basically 3 areas on this form that you can use to identify clients assisted under your MIPPA grant.

- 1) You will no longer need to write in MIPPA on your form. Rather, for reporting MIPPA-funded LIS and MSP applications, use the “Nationwide and CMS Special Use Fields” (see image below) of the Client Contact Form to identify your client as a MIPPA-related contact. Field 01 will be used for MIPPA related contacts, coded as follows:

Enter “1” in the first Nationwide and CMS Special Use Field for clients assisted only with LIS.

Nationwide and CMS Special Use Fields									
01	02	03	04	05	06	07	08	09	10

Enter “2” in the first Nationwide and CMS Special Use Field for clients assisted only with MSP.

Nationwide and CMS Special Use Fields									
01	02	03	04	05	06	07	08	09	10

Enter “3” in the first Nationwide and CMS Special Use Field for clients that are assisted with applying for both benefits - LIS and MSP.

Nationwide and CMS Special Use Fields									
01	02	03	04	05	06	07	08	09	10

- 2) The new Client Contact Form also allows you to identify whether your LIS-related contact was for application assistance, screening or benefits counseling. When you code your LIS contacts, please select the appropriate field number to identify the type of contact. For instance, for application assistance, select number 13; for eligibility and screening select number 11. If you simply explain LIS to one of your clients but do not screen or help them to apply, you would select number 12. **While the new form gives you the option of choosing the type of contact, you are only required under MIPPA to report the number of people for whom you provided application assistance.**

Part D Low Income Subsidy (LIS/Extra Help)

11	Eligibility/Screening
12	Benefit Explanation
13	Application Assistance
14	Claims/Billing
15	Appeals/Grievances

- 3) Similarly the new Client Contact Form has a more detailed coding for your MSP-related contacts. Please select the appropriate field number to identify the type of contact. For instance, for application assistance select number 47; for eligibility and screening select number 46.

MEDICAID

46	Medicare Savings Programs (MSP) Screening (QMB, SLMB, QI)
47	MSP Application Assistance
48	Medicaid (SSI, Nursing Home, MEPS, Elderly Waiver) Screening
49	Medicaid Application Assistance
50	Medicaid/QMB Claims
51	Fraud and Abuse

Following are examples to help clarify this:

Example- LIS application assistance:
 If you assisted a client with an LIS application, you would select the following fields:

- #13 Application Assistance – under Part D Low Income Subsidy **and**
- Code “1” in the first Nationwide and CMS Special Use Field

Part D Low Income Subsidy (LIS/Extra Help)

11	Eligibility/Screening
12	Benefit Explanation
13	Application Assistance
14	Claims/Billing
15	Appeals/Grievances

1	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

Example- MSP application assistance:

If you assisted a client with an MSP application, you would select the following fields:

- #47 MSP Application Assistance – under MEDICAID **and**
- Code “2” in the first Nationwide and CMS Special Use Field

MEDICAID

46	Medicare Savings Programs (MSP) Screening (QMB, SLMB, QI)
47	MSP Application Assistance
48	Medicaid (SSI, Nursing Home, MEPD, Elderly Waiver) Screening
49	Medicaid Application Assistance
50	Medicaid/QMB Claims
51	Fraud and Abuse

2	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

Example- LIS and MSP application assistance:

If you assisted a client with applications for both LIS and MSP, you would select the following fields:

- #13 Application Assistance – under Part D Low Income Subsidy **and**
- #47 MSP Application Assistance – under MEDICAID **and**
- Code “3” in the first Nationwide and CMS Special Use Field

Part D Low Income Subsidy (LIS/Extra Help)

11	Eligibility/Screening
12	Benefit Explanation
13	Application Assistance
14	Claims/Billing
15	Appeals/Grievances

MEDICAID

46	Medicare Savings Programs (MSP) Screening (QMB, SLMB, QI)
47	MSP Application Assistance
48	Medicaid (SSI, Nursing Home, MEPD, Elderly Waiver) Screening
49	Medicaid Application Assistance
50	Medicaid/QMB Claims
51	Fraud and Abuse

3	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

SHIP PUBLIC AND MEDIA ACTIVITY FORM

SHIPs may choose to use the SHIPTalk/NPR system to collect and aggregate data on their LIS, MSP, Part D and Prevention and Wellness related activities for their 9-month and 24-month MIPPA reports. If your state decides to do so, you will need to use the Public Activity and Media (PAM) Form.

There have been some important changes to the Client Contact Form that should make it easier for you for collect data on clients whom you assist through your MIPPA grant work. You will no longer need to write in MIPPA on your form. Rather, use the “Nationwide and CMS Special Use Fields” (see image below) of the PAM Form to identify your MIPPA-funded outreach and enrollment activities. Any value (1, 2, or 3) in the PAM Nationwide CMS Special Use Fields 1 identify a MIPPA-related event.

1 Nationwide and CMS Special Use Fields

01	02	03	04	05	06	07	08	09	10
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or

2 Nationwide and CMS Special Use Fields

01	02	03	04	05	06	07	08	09	10
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or

3 Nationwide and CMS Special Use Fields

01	02	03	04	05	06	07	08	09	10
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Identifying the Type of Event and Activity

The PAM form groups the different types of events and activities under 7 broader categories (see table below). These events are listed under the Activity and Event Section for the form. MIPPA reporting elements only include four broader categories: Enrollment Events, Outreach Mailing, Outreach Public Events and Outreach Media. These categories are then broken down by topic and audiences.

PAM Form Types of Events and Activities	Counted under MIPPA as:
1 Interactive Presentation to Public. Face-to-Face (In-Person)	Outreach Public Event
2 Booth or Exhibit. At Heath Fair, Senior Fair, or Special Event	Outreach Public Event
3 Dedicated Enrollment Event Sponsored By SHIP or in Partnership	Enrollment Event
4 Radio Show. Live or Taped. Not a Public Service Announcement or Ad	Outreach Media
5 TV or Cable Show. Live or Taped. Not a Public Service Announcement or Ad	Outreach Media
6 Electronic Other Activity. PSAs, Electronic Ads, Crawls, Video Conf, Web Conf, Web Chat	Outreach Media
7 Print Other Activity. Newspaper, Newsletter, Pamphlets, Fliers, Posters, Targeted Mailings	Outreach Mailings (proxy)

Examples

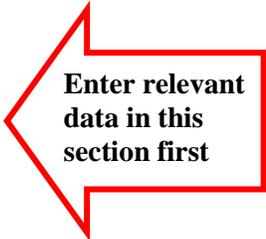
To help make this clearer, here are some examples of different types of MIPPA activities and how you should enter them into the PAM:

Example: LIS enrollment events – First, you will need to enter the relevant data under Activity or Event section #3 “Dedicated Enrollment Event Sponsored by SHIP or in Partnership.” This will identify the event as an enrollment activity. In addition, you will need to select:

- Field #6 Medicare Prescription Drug Coverage – PDP/MA **and**
- Field #13 Low-Income Assistance under Topic Focus, **and**
- Any value (1, 2, 3) in the first Nationwide and CMS Special Use Field

In addition, if an event was conducted in a rural area, you would also select field #22 under Target Audiences.

3	Dedicated Enrollment Event Sponsored By SHIP or in Partnership.			
	Est Number Persons Reached at Event Regardless of Enroll Assistance			
	Estimated Number Persons Provided Any Enrollment Assistance			
	Estimated Number Provided Enrollment Assistance with Part D			
	Estimated Number Provided Enrollment Assistance with LIS			
	Estimated Number Provided Enrollment Assistance with MSP			
	Estimated Number Provided Enrollment Assist Other Medicare Program			



Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

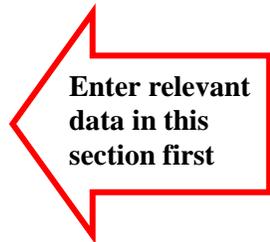
1	Nationwide and CMS Special Use Fields
	01 02 03 04 05 06 07 08 09 10

Example: MSP Enrollment Event – First, you will need to enter the relevant data under Activity or Event section #3 “Dedicated Enrollment Event Sponsored by SHIP or in Partnership.” This will identify the event as an enrollment activity. In addition, you will need to select:

- field #9 QMB-SLMB- QI under Topic Focus, **and**
- Any values (1, 2, 3) in the first Nationwide and CMS Special Use Field

In addition, if this event was targeted to a rural audience you will need to select field #22 RURAL under Target Audiences.

3	Dedicated Enrollment Event Sponsored By SHIP or in Partnership.			
	Est Number Persons Reached at Event Regardless of Enroll Assistance			
	Estimated Number Persons Provided Any Enrollment Assistance			
	Estimated Number Provided Enrollment Assistance with Part D			
	Estimated Number Provided Enrollment Assistance with LIS			
	Estimated Number Provided Enrollment Assistance with MSP			
	Estimated Number Provided Enrollment Assist Other Medicare Program			



Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

1	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

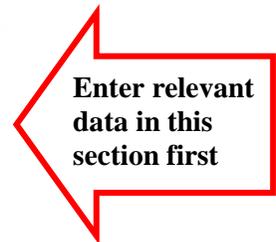
Example: LIS and MSP Enrollment Event – First, you will need to enter the relevant data under Activity or Event section #3 “Dedicated Enrollment Event Sponsored by SHIP or in Partnership.” This will identify the event as an enrollment activity. In addition, you will need to select:

- Field #6 Medicare Prescription Drug Coverage – PDP/MA **and**
- Field #9 QMB-SLMB-QI under Topic Focus, **and**
- Field #13 Low-Income Assistance under Topic Focus, **and**
- Any value (2, 2, 3) in the first Nationwide and CMS Special Use Field

If this event was targeted to a rural audience, you will also need to select field #22 RURAL under Target Audiences.

IMPORTANT: You will need to select field #13 Low-Income Assistance under Topic Focus in addition to field #6 in order to code this event as an LIS-related activity. Otherwise, field #6 is recognized as Part D only. If you fail to do so in this specific case, your event will be counted as an enrollment event for MSP only.

3	Dedicated Enrollment Event Sponsored By SHIP or in Partnership.			
	Est Number Persons Reached at Event Regardless of Enroll Assistance			
	Estimated Number Persons Provided Any Enrollment Assistance			
	Estimated Number Provided Enrollment Assistance with Part D			
	Estimated Number Provided Enrollment Assistance with LIS			
	Estimated Number Provided Enrollment Assistance with MSP			
	Estimated Number Provided Enrollment Assist Other Medicare Program			



Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

1	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

Example: LIS Only Outreach Activity – First, you will need to enter the relevant data under the appropriate Activity or Event.

Only activities under fields 1, 2, 4, 5, 6 and 7 are counted as outreach activities. After entering that data, you will need to select:

- Field #6 Medicare Prescription Drug Coverage – PDP/MA **and**
- Field #13 Low-Income Assistance under Topic Focus, **and**
- Any value (1, 2, 3) in the first Nationwide and CMS Special Use Field

IMPORTANT: You will need to select field #13 Low-Income Assistance under Topic Focus in addition to field #6 in order to code this as an LIS-related activity. Otherwise, field #6 is recognized as Part D only. If you fail to do so in this specific case, your event will be counted as a Part D only outreach activity.

Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

1 →	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

Example: MSP Only Outreach Activity – First, you will need to enter the relevant data under the appropriate Activity or Event.

Only activities under fields 1, 2, 4, 5, 6 and 7 are counted as outreach activities. After entering that data, you will need to select:

- Field #9 QMB-SLMB-QI under Topic Focus, **and**
- Any value (1, 2, 3) in the first Nationwide and CMS Special Use Field

Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

Nationwide and CMS Special Use Fields										
01	02	03	04	05	06	07	08	09	10	

Example: Rural Part D Only Outreach Activity – First, you will need to enter the relevant data under the appropriate Activity or Event.

Only activities under fields 1, 2, 4, 5, 6 and 7 are counted as outreach activities. After entering that data, you will need to select:

- Field #6 Medicare Prescription Drug Coverage – PDP/MA and field #22 RURAL under Target Audiences **and**
- Any value (1, 2, 3) in the first Nationwide and CMS Special Use Field

IMPORTANT: Please do not select field #13 Low-Income Assistance under Topic Focus even if you assisted low-income individuals, as it will code your event as an LIS-related activity. If you wish to report that this activity was targeted to low-income individuals, please do so using field #4 Low-Income under Target Audiences.

Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

Nationwide and CMS Special Use Fields										
01	02	03	04	05	06	07	08	09	10	

Example: - Multiple Topics (Benefits Only) Outreach Activity – First, you will need to enter the relevant data under the appropriate Activity or Event. Only activities under fields 1, 2, 4, 5, 6 and 7 are counted as outreach activities. After entering that data, you will need to select:

- Field #6 Medicare Prescription Drug Coverage –PDP/MA **and**
- Field #9 QMB-SLMB-QI under Topic Focus, **and**
- Field #13 Low-Income Assistance under Topic Focus, **and**
- Any value (1, 2, 3) in the first Nationwide and CMS Special Use Field

IMPORTANT: Multiple topics (Benefits Only) refers to any combination of LIS, MSP and Part D. You will need to select at least field #6 and field #9 under Topic Focus in order for your activity to be counted as Multiple Topics.

Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

1	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

Example: Prevention and Wellness Outreach Activity - First, you will need to enter the relevant data under the appropriate Activity or Event. Only activities under fields 1, 2,4,5,6 and 7 are counted as outreach activities. After entering that data, you will need to select:

- • Field #12 Medicare Preventive Services under Topic Focus, **and**
- • Any value (1, 2, 3) in the first Nationwide and CMS Special Use Field

Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

1	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10

Example: Multiple Topics (Prevention and Wellness + Benefits) Outreach Activity – First, you will need to enter the relevant data under the appropriate Activity or Event. Only activities under fields 1, 2, 4, 5, 6 and 7 are counted as outreach activities. After entering that data, you will need to select:

- Field #6 Medicare Prescription Drug Coverage – PDP/MA **and/or**
- Field #9 QMB-SLMB-QI under Topic Focus, **and/or**
- Field #13 Low-Income Assistance under Topic Focus, **and/or**
- Any value (1, 2, 3) in the first Nationwide and CMS Special Use Field

IMPORTANT: Multiple topics (Prevention and Wellness + Benefits) refers to any combination of LIS, MSP and/or Part D with Prevention and Wellness Activities. You will need to select at least field #12 and one of the fields for Benefits (field #9 and field #6) under Topic Focus in order for your activity to be counted as Multiple Topics (Prevention and Wellness + Benefits).

Topic Focus - Check All That Apply	
1	Medicare Parts A and B
2	Plan Issues - Non-Renewal, Termination, Employer-COBRA
3	Long-Term Care
4	Medigap - Medicare Supplements
5	Medicare Fraud and Abuse
6	Medicare Prescription Drug Coverage - PDP / MA-PD
7	Other Prescription Drug Coverage - Assistance
8	Medicare Advantage
9	QMB - SLMB - QI
10	Other Medicaid
11	General SHIP Program Information
12	Medicare Preventive Services
13	Low-Income Assistance
14	Dual Eligible with Mental Illness Mental Disability
15	Volunteer Recruitment
16	Partnership Recruitment
17	Other Topics - Describe:

Target Audiences - Check All That Apply	
1	Medicare Pre-Enrollees - Age 45-64
2	Medicare Beneficiaries
3	Family Members - Caregivers of Medicare Beneficiaries
4	Low-Income
5	Hispanic, Latino, or Spanish Origin
6	White, Non-Hispanic
7	Black, African American
8	American Indian or Alaska Native
9	Asian Indian
10	Chinese
11	Filipino
12	Japanese
13	Korean
14	Vietnamese
15	Native Hawaiian
16	Guamanian or Chamorro
17	Samoan
18	Other Asian
19	Other Pacific Islander
20	Some Other Race-Ethnicity
21	Disabled
22	Rural
23	Employer-Related Groups
24	Mental Health Professionals
25	Social Work Professionals
26	Dual-Eligible Groups
27	Partnership Outreach
28	Presentations to Groups in Languages Other Than English
29	Other Audiences - Describe:

1 →	Nationwide and CMS Special Use Fields									
	01	02	03	04	05	06	07	08	09	10