

SHIBA client counseling six-step intake script

SHIBA counselors, before using this script, ask yourself:

- Is the counseling site private and free from distractions?
- Do I have phone, computer and Internet access if needed?
- Have I planned for client access issues (disability, language, etc.)?
- If I need help, do I have the contact information for my volunteer coordinator?

Following the steps below will help you gather needed information to best assess the client's options:

- Focus on the client and use a person-centered approach, which is about ensuring someone is at the center of decisions that relate to their life.
- The steps will not always go in order.
- It's ok to put these statements and questions in your own words.
- Work with the client at their pace, which may mean going back to the third step of clarification while giving a referral.

Step 1: Welcome, introduction and disclaimer

- This phase is the most important. It's where you develop rapport and trust with the beneficiary.
- When the client first calls you, they may be confused about where to call and what exactly they're looking for.
- Remember to be supportive, empathetic and warm, and promote the client to share openly.
- Let the beneficiary know you're there and are willing to help.

Sample script:

Hi, I'm _____ (name) and I'm a SHIBA volunteer. SHIBA provides free, unbiased service to help people understand their health care coverage options.

To help me best identify the programs you may qualify for, I will ask you many questions. You don't have to answer any of these. But the more information you give me, the better I can help you. SHIBA keeps confidential all information our clients give us.

If you need help beyond what we do, I may refer you to other groups that we partner with. If I do this, I will give you the contact information for those other groups, and let you know how to get their help.

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If needed, here's a disclaimer:

I'm a SHIBA volunteer. We receive training from the Washington State Office of the Insurance Commissioner, and as volunteers, we give our own time to help people get the Medicare help they need.

Step 2: Assessment and asking questions

- Assessment is when you determine why the beneficiary contacted you and what they need help with. This helps the client to express their needs.
- When you ask questions let them know why you are asking certain questions. Also, only ask questions that are relevant to your task.
- Ask questions to see if there's an underlying issue the client does not recognize.
- If a client refuses to answer a question, accept their decision. However, if you suspect abuse, neglect or exploitation, keep trying to get the information.

Sample script

What can I help you with today?

Note:

- *Let clients explain their questions without interruption. You may want to take notes, if this helps you focus and keep track of information.*
- *If clients stop talking and you're not sure you have all the information, you may want to ask questions starting with:*
 - Who
 - When
 - What
 - Why
 - Where
 - How

Step 3: Clarification and confirming understanding

- Once you establish the reason the client called, ask for clarification to ensure you have a correct understanding.
- This is the perfect time to use paraphrasing and reflection skills.
- This is an important step, because if you misunderstood the client's needs, then you might waste their time and yours looking at the wrong topics.
- Sometimes the client may ask for clarification. Be honest and open with them.

Sample script

Okay, let me summarize what I've heard, so we're on the same page.

Note: *Summarize what the client told you.*

Is that correct?

Note: *If clients say no, go back to Step 2: Asking questions.*

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Step 4: Information giving

- This is when you might:
 - Explain Original Medicare versus Medicare Advantage plans
 - Describe that there are seven Extra Help plans
 - Offer contact information so they can reach their plan to check on a benefit
 - Do a Medicare Plan finder comparison with them

Note: Provide information based on the information the client gives you.

Sample script

Does this provide you with the information you need?

Note: If clients say no, go back to Step 2: Asking questions.

Step 5: Referral/assistance

- When you refer a client, you send them to a different agency or organization. Assistance is helping them to contact the other agency to address their problem.
- As a Medicare counselor, your main priority is to provide direct assistance for clients.
- It's important to be familiar with key Medicare resources, such as medicare.gov, prescription drug plan information and Medigap information, and have this information ready if you need it.
- Sometimes there isn't a resolution to a client's issue (such as enrolling in Part A and B outside of their special enrollment and general enrollment period).
- Start your problem solving by establishing reasons for the issue.
- The problem solving should result in an action plan, a step-by-step process on how to reach the goal.
- If you need to refer them, give the client choices if you can, but don't load them down with too much information.
- Remember to help clients as much as you can **within the SHIBA scope of work**. Refer when you need to using the SHIBA consulting process.

Note: Ask any outstanding Beneficiary Contact Form, client eligibility and demographic questions: If needed, you might return to Step 2 Assessment and asking questions.

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Sample script (You may have already gathered some of the answers to these by now.)

I'd like to ask a few more questions, if I may. This information helps me do the best job I can to let you know what your options are. You can choose not to answer any of these questions. Ok?

Note: *If clients say no, explain this again in different words, or give an example. If clients say yes, proceed with asking the Beneficiary Contact Form questions that the client hasn't yet answered. If clients decline to disclose information, let them know that's ok. Remind them you may not be able to let them know all their*

Step 6: Closure and confirming understanding

- When you've finished your conversation, verbally give an overview of:
- What you covered
- Your follow-up steps
- The steps the client needs to take
- Future contact details, if needed
- Before you end your meeting, ask the client to express their understanding about what you discussed and completed.
- Depending on the client's needs, you may want to follow-up to ensure they were able to resolve their issue.
- Complete the STARS Beneficiary Contact Form (BCF) and any other paperwork at the time of the counseling session or immediately after.

Sample script

Let me summarize what I've heard, so we're on the same page.

Note: *Summarize what the client told you. Take this step if the client gave you a lot more information when answering the Beneficiary Contact Form questions.*

Is that correct?

Thank you.

Note: *Finish phone call or in-person session and provide any necessary information to the client, make any needed follow-up calls and complete the STARS BCF.*