	PENNSYLVANIA DEPARTMENT OF AGING	
COMMONWEALTH OF PENNSYLVANIA DEPARTMENT OF AGING Harrisburg, PA 17101	**1. File Number:** APD # 06-29-03	**2. Disposition:** FINAL
	3. Issuance Date: October 5, 2006	**4. Effective Date:** Immediately
	5. Program Area: APPRISE	

6. Origin: Bureau for Advocacy, Protection and Education	**7. Contact:** Healthy Aging, Education, and Outreach Division (717) 783-8975

AGING PROGRAM DIRECTIVE

SUBJECT: **MINIMUM PERFORMANCE STANDARDS FOR THE APPRISE TELECENTERS**

TO:
EXECUTIVE STAFF
BERKS COUNTY OFFICE OF AGING
CENTRE COUNTY OFFICE OF AGING
DELAWARE COUNTY OFFICE OF
    SERVICES FOR THE AGING (COSA)
AAA OF WESTMORELAND COUNTY
PHILADELPHIA CORPORATION FOR
    AGING

ALLEGHENY COUNTY AAA
BLAIR SENIOR SERVICES, INC.
CLEARFIELD COUNTY AAA
JEFFERSON COUNTY AAA
LACKAWANNA COUNTY AAA
MONROE COUNTY AAA
SCHUYLKILL COUNTY OFFICE OF
    OF SENIOR SERVICES

FROM:

William Johnston-Walsh
Deputy Secretary
Pennsylvania Department of Aging

Ivonne Gutiérrez Bucher
Chief of Staff
Pennsylvania Department of Aging

PURPOSE: The purpose of this Aging Program Directive is to transmit to the Area Agencies on Aging (AAAs), which operate or subcontract the operations of an APPRISE Telecenter, minimum performance standards for each Telecenter.

BACKGROUND:

The APPRISE State Health Insurance Assistance Program (SHIP) is part of a national network funded by the Centers for Medicare and Medicaid Services (CMS). Through the coordination and support of CMS, the Pennsylvania Department of Aging (PDA), AAAs and other subcontractors, the APPRISE program offers consumers a competent, committed and compassionate consumer-friendly network of staff and volunteers.

The APPRISE program helps Medicare beneficiaries of all ages residing in Pennsylvania to understand their health insurance options and make informed decisions about what is best for the consumer without providing any bias about their choices. Additionally, the APPRISE program plays a major advocacy role in assisting Medicare beneficiaries during an appeals process.

Currently, there are twelve (12) APPRISE Telecenters operating at least one day per week. Each Telecenter, either operated by the AAA or a subcontractor, is staffed by two (2) volunteers and supervised by the APPRISE coordinator on their scheduled day of coverage.

PERFORMANCE-BASED FUNDING:

This APD is establishing standards of performance to all Telecenters in an effort to measure successes and identify areas of needed improvement for each center. The standards will also provide a valuable tool for which PDA will use to reward or motivate Telecenters based on their performance.

Each Telecenter will be allocated an annual amount of funding and the base funding levels will be established beginning Fiscal Year 2006-07. The annual base funding amount will be allocated for each operational Telecenter. Additional funding, will be made available to each Telecenter based on the performance of the Telecenter. APPRISE Regional Coordinators will conduct ongoing reviews of each Telecenter utilizing the minimum standards outlined in this directive. Telecenters may also be eligible for extra funding to provide additional days of coverage during times of high call volumes.

STAFFING:

The following minimum standards have been established to ensure an adequate staff compliment at each APPRISE Telecenter. Each Telecenter must:

- Designate a Telecenter coordinator;
- Designate a back-up Telecenter coordinator;
- Staff the Telecenter with a minimum of two (2) trained APPRISE counselors to operate the Telecenter on assigned days. This should equate to two (2) volunteers; however, if only one (1) volunteer is available, an APPRISE coordinator or staff must provide telephone coverage; and

- Have a completed and updated volunteer schedule, which includes but is not limited to:
  - Adequate volunteer back-up coverage; and
  - Sufficient work opportunities and shifts if a large core of volunteers are available.
- Build volunteer capacity sufficiently to cover anticipated and unusually high call volume demand.

The following minimum standards have been established to ensure a proper level of staff and volunteer training is conducted:

- Training standards available in the APPRISE coordinator manual;
- Volunteers should be proficient in navigating APPRISE web site and related resources. Employees and volunteers in the Telecenter must be computer literate. If staff are not computer literate, basic computer and internet training must be provided to them;
- New volunteers must shadow a staff person or a designated volunteer for a minimum of three (3) days; and
- Volunteers need to complete a three-day new counselor training, two-day advanced counselor training, and attend two (2) regional update sessions per year.

OPERATIONS & ACCOUNTABILITY:

Each APPRISE Telecenter must:

- Operate as a Telecenter a minimum of one day a week;
- Operate a minimum of 50 weeks a year, and should plan to be available when:
  - Additional coverage is necessary in situations resulting in high call volume; and
  - Additional coverage offered when Telecenter cannot operate due to scheduling problems, holidays or scheduled days off. PDA will not reimburse AAAs for assigned Telecenter days of operation that fall on a holiday or in which the AAA has closed the Telecenter, unless those days have been rescheduled.
    - Example – A Telecenter's regularly scheduled day of operation falls on a holiday or due to another commitment the Telecenter is closed. You must provide PDA at least a thirty (30) day notice, so adequate coverage can be arranged by another Telecenter. The Telecenter must make up that missed day of operation at a future date. The make-up date will be negotiated with PDA. If the

scheduled date is not made-up, the Telecenter will not be paid for that missed day.

- Provide a representative to attend and/or participate in the ten (10) scheduled Telecenter conference calls and two semi-annual meetings; and

- Answer an average of 40 calls per line daily to the Telecenter when call volumes exceed that amount. This average will be calculated on a monthly basis.

- APPRISE regional coordinators will conduct quality assurance "mystery calls: to each Telecenter on a bi-monthly basis. Quality assurance minimum standards are being developed.

Telecenters must maintain required duties listed in the Telecenter Manual and perform all duties specified in the Coordinator's manual:

- Coordinator must provide orientation (refer to Telecenter Manual) for each volunteer;

- Coordinator must provide a summary at the beginning of the fiscal year to the State Director that includes:
  - Orientation schedule;
  - Current list of Telecenter staff, name of all volunteers, and training needs; and
  - Conduct a monthly meeting with staff to keep them updated on Medicare issues.

CUSTOMER SERVICE:

Each APPRISE Telecenter must ensure the following requirements focused on customer service:

- Follow customer service guidance in the Telecenter Manual;
- Establish a system for proper referrals;
- Have system in place for needed call backs;
- Voice mail is prohibited for APPRISE Telecenters; and
- Any and all messages taken by a volunteer must be returned within the next business day.

TECHNOLOGY:

The following minimum standards must be met by each Telecenter:

- Coordinator must have e-mail capability and an e-mail address with daily access to the account; and

- Telecenters must have two (2) operational computers with high-speed internet access.

REPORTING and RECORDING:

The AAAs operating APPRISE Telecenters must ensure the following:

- Client Contact forms must be accurately completed for each caller;
- Shiptalk data entered by federally established due dates;
- Specify adequate means to enter data in system; and
- Current contact and demographic information on volunteers must be kept onsite and made available during ongoing reviews conducted by the APPRISE Regional Coordinators.

TECHNICAL ASSISTANCE:

The Bureau for Advocacy, Protection & Education should be contacted with any questions regarding the operations of the APPRISE Telecenters. Please contact Matthew Brady or Jack Vogelsong at (717) 783-8975.