Welcome to OHIC Annual Conference

August 3-6, 2026

Washington, DC

ACL
Administration for Community Living


Thank You!



Donna Bethge
Project Officer



Akia Dieuseul
Project Officer



Maggie Flowers
MIPPA Program Manager



Katie Glendening
Project Officer



Rebecca Kinney
Director



Vonetta Norman
Project Officer



Allie Oetoyo
Project Officer



Chiquita O'Cain
Project Officer



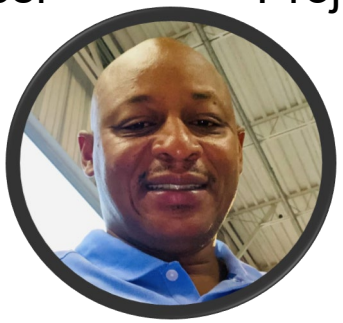
Shefy Simon
Project Officer



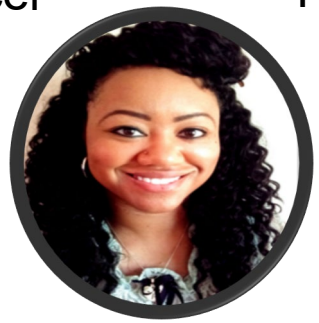
Melissa Simpson
SHIP Program Manager



Kyle Stokes
Project Officer



JT Terrell
Project Officer



Emberly Zellars
Project Officer

Logistics & Reminders

Food

- Folders have list of close options
- Hotel has some Grab & Go

Reminders

- 5pm Today – Directors Only Meeting

Please do not record sessions or presentations unless given prior approval from the presenter.

ACL Update, Strategic Priorities, and Operational Drivers

Mary Lazare, Principal Deputy Administrator, serving as the senior official performing the duties of the ACL Administrator and Assistant Secretary for Aging

ACL's Strategic Priorities

- Caregiving (Unpaid and Paid)
- Connecting People to Services
- Whole-Person Health at Home
- Employment
- Protecting Rights and Preventing Abuse
- Economic Security

ACL’s Operational Drivers



01

Scaling

Expanding what works



02

Marketing

Elevating visibility and access



03

Outcomes

Measuring what matters



04

Speed

Responding to emerging needs



05

Grantmaking

Investing for long-term impact

Center for Innovation & Partnership

Kelly Cronin
Deputy Administrator, Center for Innovation & Partnership (CIP)

Challenges

- Medicare decisions are more complex for beneficiaries
- An increasingly electronic, data rich world comes with greater risk of security breaches and fraud
- Resources are the same

Opportunities

- Person level support is even more important
- AI is evolving rapidly and can support counselors and potentially serve more beneficiaries
- Medicaid administrative claiming

Coordination with State No Wrong Door: Promoting Efficiency in a Fragmented System

- Builds on existing state infrastructure to develop a one-stop, coordinated access system for LTSS
- Promotes efficiency in state and local government by encouraging agencies to work together to cut red tape
- Enhances economic security by providing options for people before they become Medicaid eligible
- Prevents and/or delays costly institutional care paid for by Medicaid

NWD State Grants

- Support state level governance and infrastructure to streamline individuals access to LTSS
- Current Grantees: CA, MD, MA, MI, MO, MS, NC, RI, TX, UT, VT, VA, WA, WI

National NWD Resource Center

- Contract provides technical assistance expansion to all 56 states and territories

No Wrong Door – By the Numbers

Medicaid Administrative Claiming

- 28 states currently claiming, 15 states planning to claim
- Approx. $62 million in reimbursements (FY 22, 17 states)

NWD Governance grant, 10 grantees, September 2022 – August 2024

- **2.7M** people served
  - 700,000 received person-centered counseling
  - 240,000 received a documented plan
  - 930,000 people supported in completing applications for non-Medicaid state and federal programs
  - 175,000 supported with Medicaid applications

OHIC Priorities and Activities for 2026

Rebecca Kinney
Director, Office of Healthcare Information and Counseling

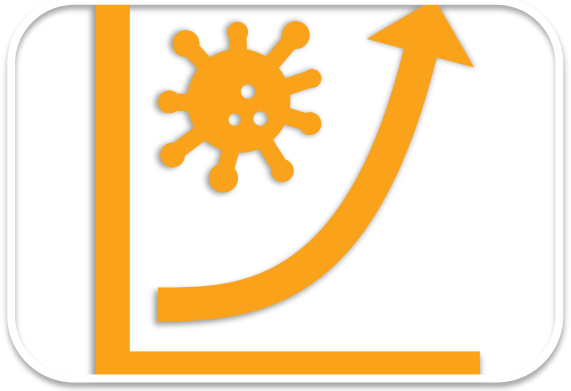
Office of Healthcare Information & Counseling

The Office of Healthcare Information and Counseling (OHIC) manages **programs and activities designed to empower Medicare beneficiaries**, their families, and caregivers to make informed healthcare decisions.

Programs include:

- State Health Insurance Assistance Programs (SHIP)
- Senior Medicare Patrol (SMP)
- Medicare Improvements for Patients and Providers Act Program (MIPPA)

Current OHIC Priorities



Improving Outcomes

- Focusing on Data Integrity
- Improving Data Submission & Access



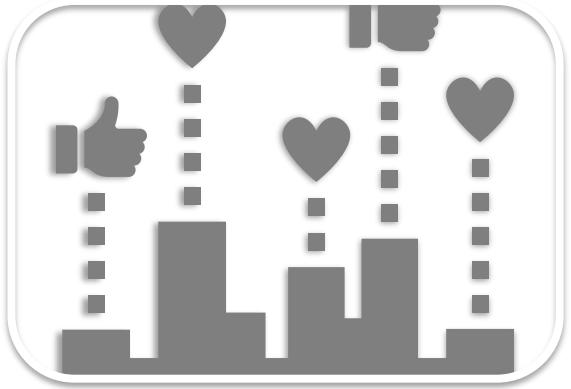
Investing In Long-Term Impact

- Improving Processes
- Focusing on Quality Assurance



Improving Marketing

- Strengthening Program Brands
- Exploring New Communication Opportunities



Scaling

- Identifying and Sharing Best Practices

Improving Outcomes

Data Integrity Matters

- **Data Drives Decisions:** High quality data enables ACL, leadership, and you to make informed policy, technical assistance, and program decisions.
- **Accuracy Matters:** Complete and correct data supports reliable decisions and meaningful information.
- **Timeliness is Essential:** Submitting data on time helps prevent delays in analysis, public reporting, and identification of important trends/issues.
- **Strong Data Stewardship Builds Trust**: Consistent, accurate reporting strengthens confidence in our programs and supports transparency of the work and impact.
- **Every Data Point Counts**: Small errors can have significant downstream impacts on trust and policy decisions.
- **Data Tells Our Story**: The information submitted reflects your organization's performance and the programs, which influences how the programs are understood and evaluated by decision makers and the public.

SMP Data Snapshot

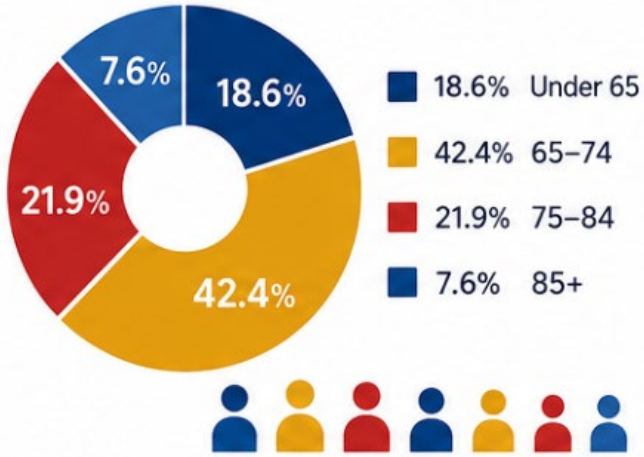
(6/1/2025 – 5/31/2026)

310,550
TOTAL CONTACTS
(229,039 COMPLEX)

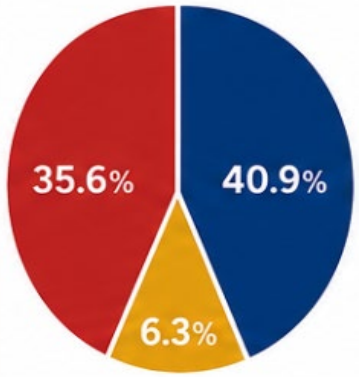
204,153
TOTAL HOURS

5,643
TEAM MEMBERS

AGE RANGE OF CLIENTS



SERVICE DELIVERY METHODS



40.9% Phone

35.6% In Person at Site

6.3% In Person at Home or Facility

HOW DID THEY HEAR ABOUT SMP?

39% Were previously served

11% Referred by friend/relative

17% Referred by partner agency



11% Are veterans or have a family member of a veteran

CASES AND REFERRALS

450
Cases submitted to OIG

327
Cases referred to 1-800-Medicare

473
Cases referred to MFCU

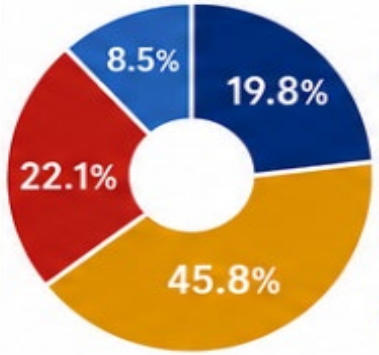
SHIP Data Snapshot

(4/1/2025 – 3/31/2026)

2,985,458
PEOPLE REACHED VIA OUTREACH EVENTS
↑ 4.6% increase over prior year

1,921,853
TOTAL SHIP CONTACTS
↑ 3% increase over prior year

AGE RANGE OF CONTACTS



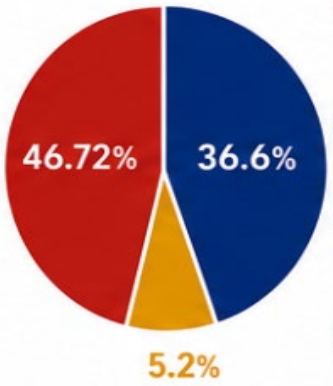
- 19.8% Under 65
- 45.8% 65–74
- 22.1% 75–84
- 8.5% 85+

49.2% CONTACTS ARE BELOW 150% FPL

HOW DID YOU HEAR ABOUT THE PROGRAM?

- 30.3% Previous Contact
- 14.4% Partner Agency
- 9.6% Friend or Relative
- 17% SHIP Presentation

METHOD OF CONTACT



- 46.72% Phone
- 36.6% In-Person at Site
- 5.2% In-Person at Home
- 6% Web/Email

OUR TEAM

11,149
TOTAL TEAM MEMBERS

45.3% VOLUNTEER

50.2% HAVE BEEN WITH THE PROGRAM OVER 5 YEARS

BENEFIT EXPLANATIONS ARE HIGHEST TOPIC DISCUSSED

- 78.3% Original Medicare
- 55.3% Medigap
- 75% Medicare Advantage
- 82.1% Part D
- 66.4% LIS
- 67.3% Medicaid

MIPPA Data Snapshot

(9/1/2024 – 8/31/2025)

1,279,783
TOTAL CONTACTS

109,756
ENROLLMENT ASSISTANCE
with LIS or MSP

31,563
OUTREACH AND
ENROLLMENT EVENTS

OUR TEAM

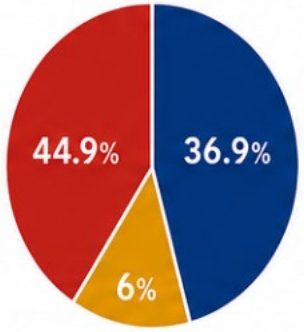
10,906
TOTAL TEAM MEMBERS

50% VOLUNTEER

HOW DID YOU HEAR ABOUT THE PROGRAM?

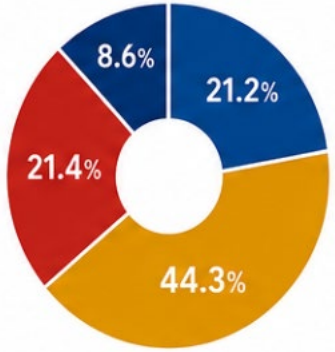
- **15.7%** Partner agency
- **25.9%** Previous contact
- **23.2%** Program Presentation
- **8%** Friend or Relative

METHOD OF CONTACT



- **44.9%** Phone
- **36.9%** In Person at Site
- **6%** At Home or Facility

AGE OF CONTACTS



- **21.2%** Under 65
- **44.3%** 65–74
- **21.4%** 75–84
- **8.6%** 85+

TOPICS DISCUSSED INCLUDE

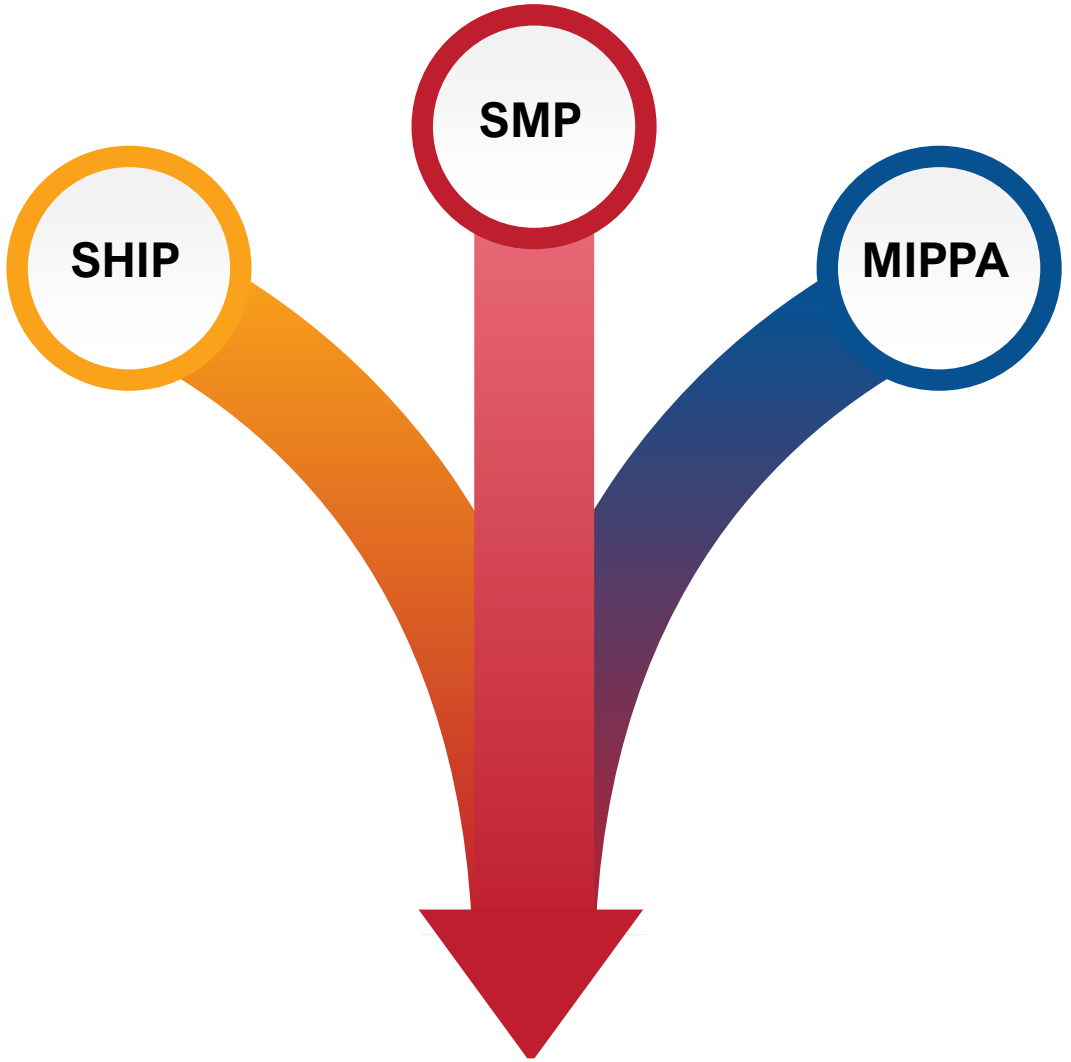
- **54.3%** Original Medicare Benefit Explanation
- **45.7%** Medigap
- **59.4%** Medicare Advantage
- **65%** Part D
- **81.2%** LIS
- **80.5%** Medicaid

New Data System

ACL is replacing SIRS and STARS with a single, modern platform built around what grantees and program staff say they need most.

The new system will include:

- Single sign-on
- Simplified reporting by creating one set of forms that cross all three programs
- Easier access to data and reports



New Data System - Where Are We?

✓

COMPLETE

Requirements Gathering

Working groups with grantees and program staff identified what the new system needs to do.

2

IN PROGRESS

Vendor Selection

ACL is evaluating vendors to build the new system based on grantee and staff input.

3

UPCOMING

Design & Build

The selected vendor designs and builds the platform, with grantee review along the way.

4

UPCOMING

Testing & Rollout

Grantees test the system and receive training before go-live.

New Data System – How Will You Stay Involved?

✓

Requirements Input — Already Complete

Working group sessions captured what grantees need most from the new system.

2

Design Review

Grantees will see and react to system designs and workflows before development is finalized.

3

User Testing

Grantees get hands-on with the new system and share feedback before go-live.

4

Training & Rollout Support

Step-by-step training and support will help your team transition smoothly.

Visit the New Data System Resource Table

Submit Feedback

Ask Questions

Booth staffed:
Tuesday 8:30am – 12:30pm

Investing in Long-Term Impact

New Casework Processes & Technical Assistance

Centralized Medicare Policy and Casework Inquiry Process

Simplified Referral Process

Complex Casework Grand Rounds Webinars

Plenary Session on Wednesday at 4pm

New Certification Requirement

- **National Competency Framework**
  - Core foundational knowledge and skills by program
  - Implemented for SHIP, SMP, and MIPPA team members that come into contact with Medicare beneficiaries, their families, or caregivers
- **Standardized Testing by Program**
  - ACL administered online exam/s developed with help from SMP, SHIP, and MIPPA networks
- **Implemented via Integration with New Data System**
  - Testing and Certification management will be integrated into the new SHIP/SMP/MIPPA data system currently in development
  - Program Directors and state leadership will be actively involved in management of the certification process for their team members

Benefits of Standardized Certification

Consistent national level standards:

- Raises the professionalism of the work,
- Gives team members valued credentials, and
- Demonstrates high quality standards.

Benefits Include:

- Establishment of consistent baseline of knowledge and competency across programs nationally.
- Reduction in risk by verifying proficiency before team members engage with beneficiaries.
- Extra assurance that team members are competent to provide level of assistance they are certified to provide.
- Increased stakeholder and public confidence in team's capabilities.
- Identification of knowledge gaps and informs targeted training needs.

New Certification Requirement Timeline

Sept 2026 – Mar 2027

- Defining Requirements

Oct 2026-Sept 2027

- System Development
- Pilot Testing

Oct 2027-Sept 2028

- Phased Rollout

Oct 2028 +

- Steady-state operations and updates

Increasing Team Member Skills & Knowledge

- Person Centered Thinking
- Improving Understanding of Duals and Integrated Care
- Challenging Beneficiary Interactions
- Updates and Changes to Medicare Policy and Enrollment
- Casework Ground Rounds (next meeting Sept 9th)

SHIP & MIPPA Secret Shopping

New Secret Shopper Contract – Targeted Award September 2026

- Provides an independent method to validate the quality of the services provided by SHIP and MIPPA team members to help:
  - Enhance data-driven oversight
  - Inform continuous quality improvement and targeted technical assistance
  - Supplement existing monitoring and grant oversight.

Benefits:

- Improved consistency and accuracy in beneficiary counseling
- Increased public trust and beneficiary satisfaction
- Strengthened data driven evidence to describe impact of services provided

Improving Marketing

Updated SHIP and SMP Logos





- Slightly recolored versions of the existing logos
- Grantees should begin using these updated versions immediately
  - ACL will send out updated files and instructions as soon as possible

NOTE: Do not use the files from the slide deck.

New MIPPA Logo



Note: Do not use the files from the slide deck.

SMP Innovative Communications Project

- Additional funding to test out new communication channels using technology
- Partnering with SMPRC
- Testing AI, SMPRC Smartphone Ap, material translations, and other activities to expand reach of the program nationally



App Store

Google Play

Medicare Fraud Prevention Week

- 5th Year celebrating MFPW in 2026
- Focused week of media outreach promoting Medicare fraud prevention and reporting. Highlights include:
  - Joint ACL/CMS Blog with Mary Lazare and Dr. Oz
  - Many SMPRC and ACL resources available on MFPW landing pages



Scaling

Connecting is Everything

Collaboration

- Partner with other ACL grantees – BECs, AAAs, CILs
  - We're all working to support our communities
  - Let's not duplicate efforts
- Identify key partners in your communities (colleges, libraries, etc.)
- How Might We session tomorrow

Networking

- Find opportunities to meet others doing similar work
- ACL funded examples:
  - Networking and Director calls
  - Age + Action
  - This conference!

How Might We Session Tomorrow

Goals

- Leverage extensive collective expertise and experience
- Advance peer learning
- Actionable solutions
- Build on one another's ideas
- Strengthen connections
- Guide future program improvement

Outcomes

- Identify common opportunities
- Discover successful strategies to adapt and scale
- Develop new connections
- Leave with practical action(s) to explore
- "What We Heard" summaries