A DAY IN THE LIFE OF A SENIOR MEDICARE PATROL DIRECTOR

TEAMS + TOOLS + DATA

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A Day in the Life of an SMP Director

- Each day may include complex case assistance, data review, outreach planning, and staff coordination.
- Directors balance program compliance, case support, and fraud trend monitoring while working closely with staff, volunteers, and partners across the SMP network.
- These daily responsibilities offer valuable insights and lessons that can help new Directors navigate the role and strengthen their programs.



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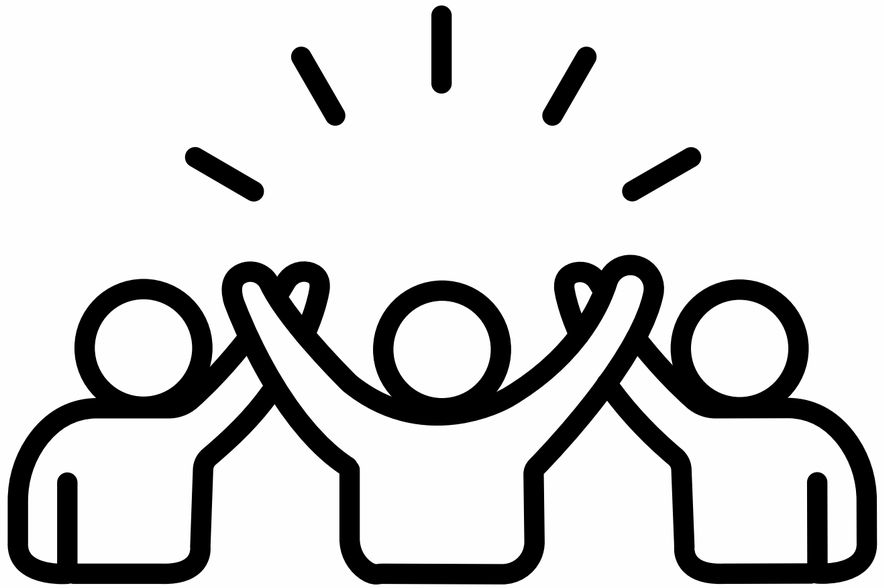
THE WORK OF AN SMP DIRECTOR CAN BE VIEWED THROUGH THREE KEY AREAS:

- ☑ TEAMS
- ☑ TOOLS
- ☑ DATA

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TEAMS



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The Power of the SMP Network

One of the greatest strengths of the SMP program is its national collaboration. Use it.

Examples:

- Share unusual fraud trends with other states
- Ask questions during Director calls with Center Staff, ACL, and CMS
- SMP- Sara Lauer, knowledgeable & responsive
- Learn from other programs' outreach strategies
- When Directors share information, the entire network becomes stronger.

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Build Relationships Early

Your success as a Director depends on relationships.

Focus early on building connections with:

- Your state SHIP program
- Resource Center staff
- Other SMP/SHIP/MIPPA Directors
- Local partners (AAA, senior centers, legal services)
- Federal Partners
- Law enforcement/ Attorney General
- Your Complex Interaction Specialists

The SMP network is one of your strongest resources.

- **Schedule regular check ins with partners**
- **Ask experienced directors how they solved similar problems.**
- **Build on processes that already work.**

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Support Staff and Volunteers

SMP programs rely heavily on people

Empower to Succeed:

- Solicit feedback from staff about their needs
- Counselor Call biweekly
- Offer ongoing training opportunities
  - July Staff Training in Albany, NY

Simple actions help:

- Sharing success stories
- Celebrating outreach milestones

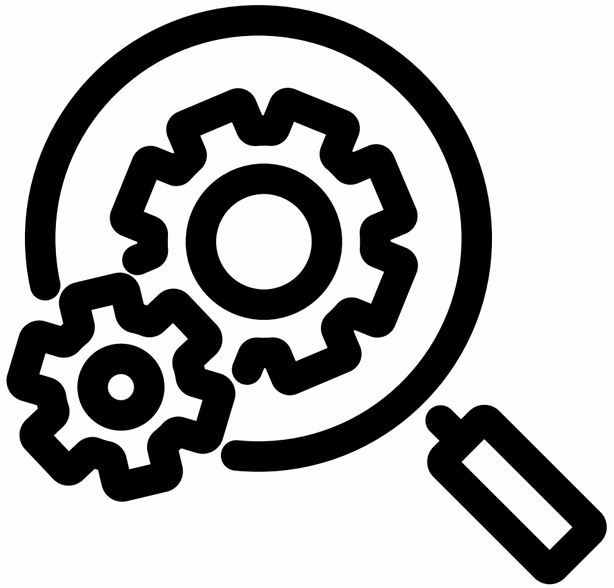
Meet with Complex Interactions Specialists every two weeks:

- Helps monitor referrals
- Identifies early trends
- Discuss barriers beneficiaries and counselors face through reporting process

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TOOLS



Use Available Resources

Important tools include:

- SMP & SHIP Resource Library
- SMP Complex Interactions Manual
- Training materials and webinars
- Director calls and peer discussions
- Regional CMS meetings

These resources support Directors in managing complex cases and program operations.



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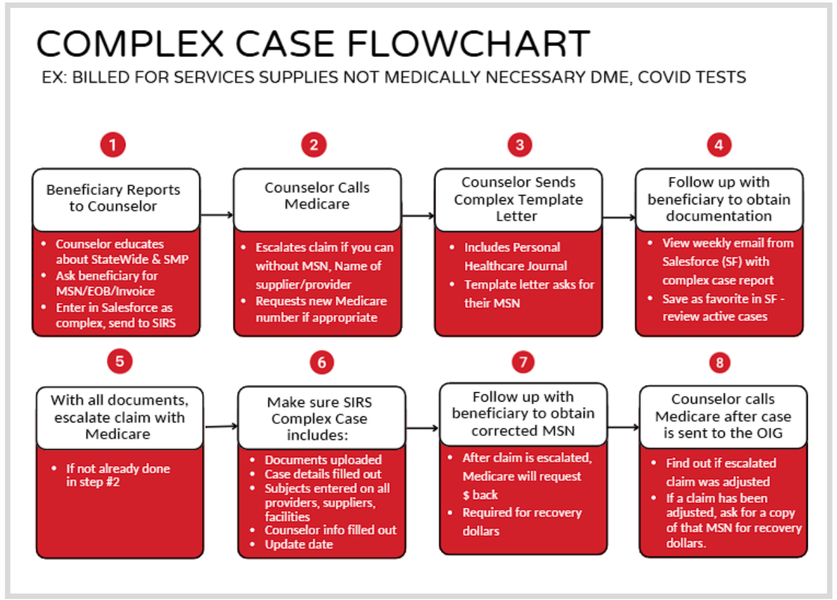
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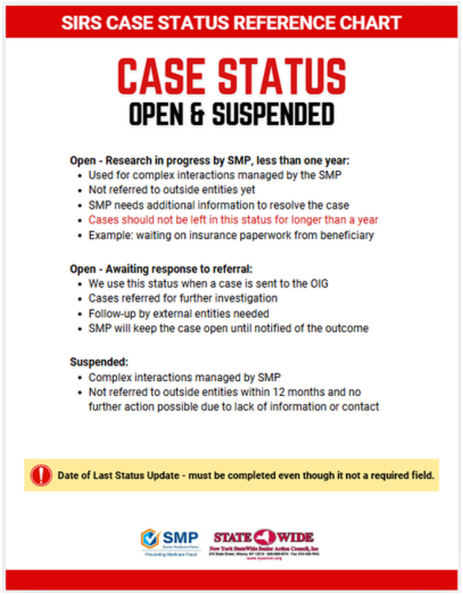
How we built upon SMP Resources

Our important training tools include:

- Volunteer Toolkit Cards
- Case Status Reference Chart
- Life of a Case flowchart
- STARS & SIRS Tip Cards

These resources support staff in managing complex cases and program operations.





Work a Case Yourself

Even as a Director, it is important to stay connected to the work.

Benefits:

- Better understanding of documentation requirements and barriers
- Insight into how staff navigates complex cases
- Ability to improve workflows
- Greater awareness of the process & builds credibility with your team.

Directors who stay connected to cases make better program decisions

Working a case firsthand can also help you;

- **Identify training gaps or process challenges**
- **Recognize emerging fraud patterns earlier**
- **Understand beneficiary concerns and frustrations**

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Stay Informed

The landscape of fraud changes constantly. Directors must be ready to adapt.

Examples include:

- New scam tactics
- Changes to Medicare policies
- Emerging billing schemes & coding
- Technology used by fraudsters
- Staying informed allows SMP programs to respond quickly.



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Remember the Mission

It is easy to get overwhelmed by data, reports, and compliance requirements.

But the mission is simple:

- Protect Medicare beneficiaries
- Prevent fraud, errors, and abuse
- Empower older adults
- Every call answered and every case investigated helps protect both individuals and the Medicare system.



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DATA



Monitor Data Regularly

Data management is one of the most critical parts of the job.

- Monitor SIRS data weekly/ monthly, not just before deadlines.
- Create a monthly data review routine with staff.

- Monthly 1on 1meetings with Counselors
  - Review caseload
  - Referrals
  - Timely follow up
  - Case status & documentation

Run Reports regularly to check for:

- ✔ **Missing data**
- ✔ **Appropriate referrals**
- ✔ **Demographic data**

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End of Month Checklist

Data management is one of the most critical parts of the job.

Individual Interactions from the previous month due by the 5th of the month:

- Group Outreach
- Media Outreach
- SIRS Activity Time
- Planned Group Outreach (Shared Calendar)

Accurate Data Allows for:

- **Quality Assurance**
- **Quality Case Notes**
- **Timely Beneficiary Assistance/ Follow up**

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Use Data to Identify Trends

Fraud rarely appears as a single incident.

Look for patterns such as:

- Multiple beneficiaries receiving the same equipment in specific geographic areas
- Billing from the same provider/ supplier in multiple reports
- Similar robocall scripts reported by beneficiaries
- Rapid increases in specific claims/ billing codes

Early detection protects beneficiaries and the Medicare trust fund.

When you see patterns:

- **Share with other Directors**
- **Notify the Resource Center & CMS**
- **Ensure Complex Interaction staff note is in case notes & SIRS narrative**
- **Track the trend internally**

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TRACKING TURNS INTO DATA

An interaction over the phone → Turns into your tracking → Which is Data, that turns into Reports → That translates need in the community

Complete, Accurate Data Shows:

- Areas of Need
- Our Impact
- Beneficiaries need our programs
- Need translates to continued funding



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Utilizing the resources and partners along with diligent data review will set you up for success.

+TEAMS
+TOOLS
+ DATA
=SUCCESS

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As Directors, we are part of a national network with decades of combined experience, insight, and vigilance. When we share what we see, lean on one another's expertise, and act as a unified front, we don't just react to fraud —we disrupt it. Together, our collective knowledge becomes one of the most powerful tools in protecting the integrity of our programs and the people we serve.

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