

New Medicare Card: Outreach & Education to People with Medicare (Beneficiaries)

Starting in January 2018

Background

Outreach and education to beneficiaries about the new Medicare card began August 2017 with a “Guard Your Card” campaign that included a paid TV ad with fraud prevention messaging, and a statement that “new Medicare cards are coming”. This was followed by earned media promotion around the unveiling of the new Medicare card design in September. Simultaneously, we mailed all beneficiaries the calendar year 2018 Medicare & You handbook, which included a full-page of information about the new card, an image showing the card design, and prompts to ensure that SSA has a current mailing address.

In the first quarter of 2018, we’ll begin amplifying new card awareness messages to beneficiaries, their families, caregivers, and advocates as well step up our work with providers as information intermediaries for beneficiaries. We’ll promote awareness of the new cards and the benefits they offer, remind this audience to be wary of scam artists, and provide tips for protecting themselves. We’re also preparing for both localized and continued national outreach and education once card mailing begins in April 2018, including messaging needs around CMS’s card mailing approach and “didn’t get my card” scenarios.

Timing

We’ll begin this new phase of robust outreach on January 23, 2018, when public attention begins to move beyond the December holidays and Martin Luther King weekend. Beginning mid-March, we’ll begin our localized outreach and earned media campaign for the first mailing wave.

Goals

- *People with Medicare (beneficiaries):*
 - *January 23 – mid-March:* Increase awareness that the mailing starts in April, encourage them to “update your address” with Social Security Administration (SSA), and watch out for fraud.
 - *Mid-March throughout 2018:* manage expectations about when they can expect to receive their new cards, conduct intensive local outreach in successive areas targeted for mailings, make sure they know what to do with their old (and new) cards and what to do if they didn’t receive a card or need help.
- *Partners:* Help us create awareness among beneficiaries, continue to educate about resources available for answering beneficiary questions as these shift over time.
- *Providers:* Educate about resources available for answering beneficiary questions. Remind them to have their systems ready by April 1, 2018 and encourage early adoption of the new Medicare Beneficiary Identifier (MBI) once cards hit the mail.

Strategy

- Proactively amplify national messaging about the new Medicare cards through CMS’s multiple existing beneficiary channels (Medicare.gov, local and national partnerships, earned and social media, etc.).
- Two weeks prior to the mailing of each wave of cards, I conduct intense local outreach the states that will receive the cards to alert beneficiaries to watch out for their card.
 - We’ll especially rely on credible local media and trusted community groups and leaders to carry our message during successive geographic mailing waves.
 - In parallel, we will continue to amplify appropriate national messaging through all existing CMS channels.

Messaging Framework for Medicare Beneficiaries (for all channels)

1. New Medicare cards are coming, starting in April 2018.
 - How the new card benefits you.
 - We are taking the social security number off the Medicare cards and sending you a new card with a new, unique number.
 - This will help protect your identity and safeguard Medicare funds.
 - The new card will not change your coverage or benefits.
 - When we're sending your new card.
 - Between April 2018 and April 2019 (with more detail as appropriate - tbd).
 - Understand that mailing everyone a new card will take some time. Your card might arrive at a different time than your friend's or neighbor's.
2. Make sure that the Social Security Administration has your current address.
 - You don't need to do anything to get a new card, but you should make sure that the Social Security Administration has your current mailing address is up to date.
 - Visit ssa.gov/myaccount or call 1-800-772-1213 to correct your mailing address, if updates are needed.
3. Fraud awareness:
 - Beware of scam artists contacting you about the new Medicare card and asking you for your current Medicare number, personal information or to pay a fee.
 - You don't need to take action to get your new Medicare card.
 - Medicare will never contact you uninvited for your Medicare number or personal information.

Starting April 1 and throughout card mailing -

4. Above messaging will continue; "update your address" will become secondary messaging. Additional messaging will include:
 - When will I get my card?
 - Understand that mailing everyone a new card will take some time. Your card might arrive at a different time than your friend's or neighbor's.
 - Visit Medicare.gov to see when you might expect your card.
 - What if I don't get my card?
 - Check Medicare.gov to see if cards have been mailed to your area.
 - If the mailing period for your area has already finished, call 1-800 Medicare to see if there's a problem.
 - Don't worry, you'll see be able to get the care you need with your existing Medicare number.
 - New ways to look up your new Medicare number or get a replacement card:
 - Once your card has been mailed, you'll be able to look up your Medicare Number or print a replacement card on MyMedicare.gov. Here's how.
 - Go to the "[Mail You Get About Medicare](#)" page on Medicare.gov so you know what to do when you receive the new card.
 - Once you've received your card:
 - When you get your new Medicare card, you should destroy the old card and start using their new card right away.
 - To help prevent fraud, old cards should be shredded instead of thrown in the trash or recycled.
 - If you have Medicare Advantage, you also may be asked to show your new Medicare card if you need hospital services.

Tactics by audience

People with Medicare (beneficiaries)

On January 23rd kick off we will:

- Introduce a “special” URL (medicare.gov/newcard that links to [Your Medicare Card Page](#)) and promote on all products/materials as they’re developed.
- Post (on Medicare.gov) and distribute:
 - a blog,
 - fact sheet,
 - informational video (also on You-Tube) and
 - beneficiary widgets directing audiences to Medicare.gov (note: widgets will reside on cms.gov).
- Include other key updates to Medicare.gov, such as yellow bar messaging (“New cards are coming, update your address”).
- Increase frequency of posts on Social Media (Facebook and Twitter).
- Push emails to beneficiaries who have signed up to receive e-mail from Medicare (> 200k beneficiaries to date).
- Amplify new card education through Regional Offices (ROs) to reinforce messaging among local partners, especially those reaching vulnerable populations.
- Amplify new card education through national partner outreach (details below).
- Begin running audio PSAs in pharmacies.

Note: Beginning in January, the “Welcome to Medicare” Package Letters and Medicare Summary Notices (MSNs) will include information about new card mailing to set beneficiary expectations.

January 23rd through mid-March, CMS will amplify the drumbeat of key new card messages as more beneficiary-focused products and resources become available via:

- Medicare.gov
- Social media (1-2 posts per week)
- Email outreach to beneficiaries
 - Note: OC will continue to promote this new feature since we are able to collect state information and can target email outreach to that beneficiary when the new cards hit the mail in their state.
- Regional outreach
 - Note: OC will distribute print ad (English and Spanish) for regions to distribute or use Strategic Language Access Plan (LAP) funds to translate into other languages (available December/January).
- National partner outreach (details below)

Note: We’ll continuously monitor 1-800 call volume and inquiries to gauge scripting needs before planned Mid-March updates.

Mid-March/April 2018 and throughout mailing:

- We can use the American Society on Aging (ASA) national conference (March 26-29 in San Francisco) to garner national press attention ahead of card mailing.
 - March 29 plenary session is a good opportunity for the Administrator or Regional Administrator (RA) to announce that “new cards start hitting the mail this week”—along with

expectation setting for duration of mailing. Can issue a media advisory and/or press release to coincide with the conference and plenary session.

Note: If we decide to publicize the geographic card mailing waves and timing, we could reveal some of this info along with the link to a new webpage about the card mailing in media advisory/press release. At a minimum, would be good to include where the cards are going first when we announce “cards hit mail”.

- Deploy new IVRs and updated scripts
 - Post Medicare.gov updates, including:
 - information about card mailing geographic mailing sequence (Decision pending),
 - create “[Mail You Get About Medicare](#)” webpage,
 - add picture of new card on Medicare.gov “hero box”,
 - update yellow bar messaging (“New Cards in the mail”).
 - Distribute videos: animated video showing how to destroy old card (post to Medicare.gov and YouTube) and videos in provider waiting rooms (via Accent Health - tbd).
 - Run additional message on MSN during card mailing period.
 - Begin paid search, directing audiences to Medicare.gov website about new card mailing sequence (Decision pending).
 - Target emails to beneficiaries in relevant states in tandem with card mailing waves.
 - Post on social media/use Facebook to geo-target posts to states expecting the next mailing wave.
 - Have contractor and ROs begin localized earned media (2 weeks prior to card mailing in each successive wave, beginning in mid-March 2018) using press kit with:
 - Drop-in articles, media advisory, customizable local press release, talking points (can also be used for interviews with RAs and other CMS officials), customizable flyers for local distribution, local social media, FAQs; also includes materials for radio, local print and TV pitching.
- Note: Will most likely apply phased approach pitching to multiple markets each week to keep press engaged and attention levels high during card mailing.*
- Amplify earned media through the ROs in coordination with the contractor to reinforce messaging among local partners.
 - Hosting or appearing at events where RAs can talk to seniors. Invite local press to events when applicable. Goal to have one event in each state.
 - Put special emphasis on reaching vulnerable populations (use LAP funds).

Reaching Vulnerable Populations

Beneficiary outreach about the new Medicare card includes a special focus on ensuring that vulnerable populations don't experience confusion, anxiety or interruptions to services or benefits as a result of the transition to new Medicare cards. Vulnerable populations include hard-to-reach individuals who face physical, geographic, cognitive, language, or literacy-related barriers, belong to racial or ethnic minorities, live in tribal or frontier rural areas, are low-income (including dual eligibles), or homeless. In order to reach these populations, we will work closely with key partners to reach them where they live, visit and worship, such as:

- State Health Insurance Assistance Programs (SHIPs) and Senior Medicare Patrols (SMPs)
- 90+ national partner groups that work with these populations
- Federal partners (e.g. HRSA, USDA, HUD)
- Faith-based organizations and local congregations
- Regional and community partners (e.g. libraries, community centers)

Partners

Outreach efforts with partners (including beneficiary-focused partners – SHIPs, SMPs, and groups who work with vulnerable populations at the national, state and community level) have two goals: increasing awareness of the initiative and resources available for education, and asking for their help in educating Medicare beneficiaries. Efforts to educate partners about the mailing started in July of 2017 and continued throughout the year. During the January through March 2018 timeframe, partner outreach will support robust beneficiary education. We will continue to distribute beneficiary-focused materials to equip partners in their interactions with beneficiaries.

On January 23rd kick off, we will ramp up outreach to beneficiary-focused, federal, state and local partners, specifically by:

- Using listservs to send reminders and links to available products (blog, fact sheet, widget, informational video)/resources to key stakeholders [and thereafter (every 1-2 weeks or as needed)].
- Personally calling or meeting with beneficiary-focused partners.
- Engaging the Office of Legislation to share/amplify new card outreach through local elected officials (per formative research).
- Sharing Social Media Toolkit with partners (including federal partners like SSA).
- Amplifying new card education through the Regional Offices to reinforce messaging by local partners, especially those reaching vulnerable populations.
- Including 8.5x11 poster in post offices.

After January 23rd through mid-March:

- Continue directing partners to key updates on Medicare.gov and CMS.gov.
- Hold PRG-led New Medicare Outreach Forum calls/webinars - late-January 2018/early February - tbd.
- Participate in Open Door Forums (ODFs) to communicate key information to partners and beneficiary advocates, particularly to reach vulnerable populations.
- Participate in Quarterly Caregiver Listening Sessions.
- Continue working with organizations that work with or reach vulnerable and “hard to reach” patient populations.
- Include information about the New Medicare Card Project at every outreach/conference event (including SHIP and SMP events) emphasizing key messages.

Mid-March/April 2018 and throughout mailing:

- Share via listservs: national press, key Medicare.gov and CMS.gov updates and available resources (animated video, additional beneficiary-facing materials).
- Personally reach out to beneficiary-focused partners.
- Share new Social Media Toolkit to partners (including federal partners like SSA).
- Re-engage Office of Legislation to share/amplify new card outreach with local elected officials in areas where cards are being mailed.
- Continue working with organizations that work with or reach vulnerable and “hard to reach” patient populations.
- Update 8.5x11 poster in post offices in areas where mailing is happening.

Providers

Outreach efforts with providers have two goals: increasing awareness of the initiative and resources available for education, and asking for their help in educating Medicare beneficiaries. Efforts to educate providers about the mailing started in 2016 because they have also have the responsibility to make sure their systems are updated and capable of receiving the MBI by April 1, 2018. During this timeframe, provider outreach will support robust beneficiary education. We will continue to distribute beneficiary-

focused materials (posters, provider tear offs, flyers, etc) to equip providers in interactions with their patients. In addition, we will ramp up provider outreach with the April 1, 2018 system readiness action deadline and encourage early MBI adoption through multiple channels including MLN Connects, key Agency listservs, updates to CMS.gov, ODFs, webinars and conferences, etc.

On January 23rd kick off, we will ramp up outreach to providers, specifically by:

- Sending via listservs reminders and links to available products (blog, fact sheet, widget, informational video)/resources to key provider stakeholders.
- Sharing information with regions to amplify and reinforce messaging among local providers and provider associations.
- Ramping up reminders for system readiness by April 1, 2018.

After January 23rd through mid-March:

- Distribute video for providers to remind them about resources to educate patients and remind them about April 1, 2018 date to have systems ready – Decision pending.
- Hold First Friday sessions to share beneficiary resources with providers - February 2, March 2, 2018 with reminders in subsequent sessions.
- Rely on Provider Ombudsman as a resource to communicate with providers and collaborate with CMS components to develop solutions to any implementation problems that arise – ongoing.
- Use ODFs to communicate key information to provider stakeholders.
- Continue directing providers to key updates on CMS.gov and Medicare.gov, notably directing them to new materials/products as they become available.
- Include information about the New Medicare Card Project at every provider-focused outreach/conference event.
- Ramp up reminders for system readiness by April 1, 2018.

Mid-March/April 2018 and throughout mailing:

In addition to tactics above,

- Run videos in provider waiting rooms (via Accent Health).
- Ramp up outreach to encourage early MBI adoption.

Ongoing Measurement and Feedback

We will continue to evaluate our outreach efforts through:

- An additional beneficiary awareness tracking survey (scheduled release week of January 29, 2018)
- Ongoing monitoring of:
 - Call center inquires/FAQs, including tracking new card calls and fraud attempts,
 - Email inquiries from partners,
 - Inquiries at conferences,
 - Social media comments,
 - Operations Center issues.