

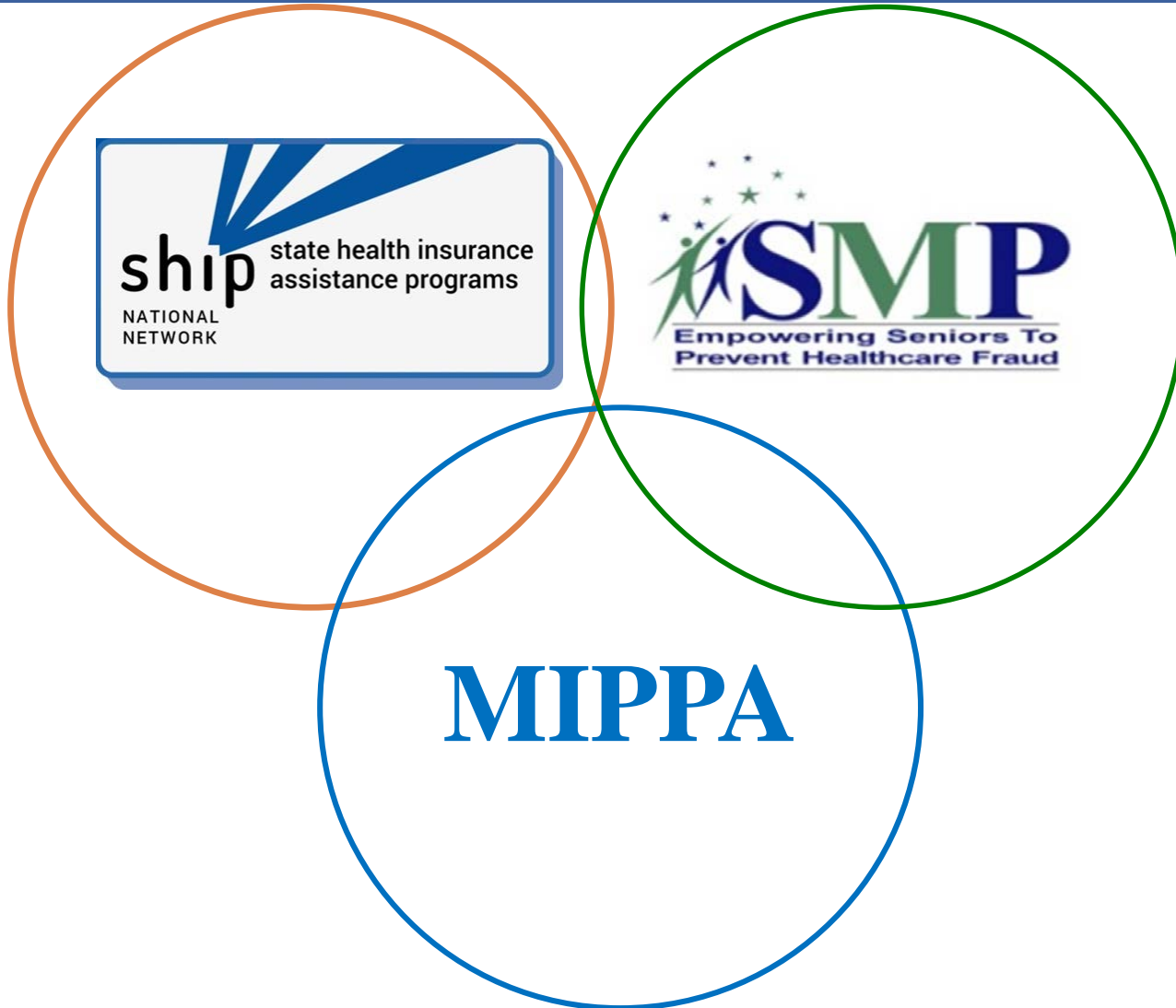


CONNECTING WITH BENEFICIARIES: COMMUNICATION TECHNIQUES FOR MEDICARE COUNSELORS

April 25, 2018

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Welcome!



NATIONAL INFORMATION AND REFERRAL SUPPORT CENTER

Connecting with Beneficiaries:
Communication Techniques for Medicare
Counselors

April 25, 2018

National I&R Support Center



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The National I&R Support Center provides training, technical assistance, and information resources to build capacity and promote continuing development of aging and disability information and referral/assistance services nationwide.

- Technical Assistance Webinars
- Training: Online training; AIRS certification training; and Train-the-Trainer
- Distribution list for sharing information and resources (to sign up, visit <http://www.nasuad.org/community-opportunities/stay-informed>)
- National surveys of Aging and Disability I&R/A Networks
- National training events, including the Aging and Disability Symposium at the annual AIRS I&R Conference

<http://nasuad.org/initiatives/national-information-referral-support-center>

The Nature of Helping Individuals

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How do most people feel when they must ask for help?

If your program did not exist, how would beneficiaries, their families, friends, and caregivers find the information, counseling and assistance that they needed?



Key Communication Techniques

Effective communication techniques are essential to the process of counseling individuals/beneficiaries – without them, it is difficult for counselors to effectively connect clients to the appropriate information and assistance needed by their situations.

Communication techniques support process...



Opening the contact and establishing rapport/trust

Assessment of the situation

Clarification to ensure an understanding of the situation

Providing appropriate information/assistance/support

Closing the contact

Communication Techniques

**Active
Listening**

**Minimal
Encouragers**

Reflection

Prioritizing

**Focus on
Feelings**

Empathy

Support

De-escalation

**Personable
Approach**

Simplicity

**Effective
Pauses**

Steering

Active Listening

Often, when others are speaking, we do not listen attentively. We are easily distracted and thinking about other things or what we plan to say next.

Active listening is a way of listening and responding to another person that improves mutual understanding. It is one of the most important concepts in effective communication.

Active listening is a structured form of listening that focuses attention on the speaker and what is actually being said.

Active Listening: *Why is this so hard?*

- Listening is a challenge for many of us...
- With communication, there is often “extra time” between speaking and hearing. This extra time allows us to think about other things rather than what the other person is saying. This is the *listening dilemma*. Communication and listening techniques can help counselors become better listeners.

For example, try not to think about how you are going to respond to the other person while he or she is speaking to you.

Paraphrasing

Paraphrasing involves providing a summary of what has been said in your own words. It lets you clarify what the client has said in order to avoid any misunderstanding or misconceptions. Paraphrasing lets the client know you have been listening and that you understand their situation.

Paraphrasing is a skill that enables clients to elaborate on their situations. As the client hears their story reflected back, it can help them to clarify whether that is how they are feeling and also if it sounds right.

Minimal Encouragers

Minimal encouragers are verbal encouragers that prompt a client to continue talking, letting them know you are listening, but do not interrupt their story.

“Mmm...”

“Yes”

“I see”

“Oh”

“Uh-huh”

Reflection

- Reflection involves repeating the key phrases used by the client.
- A breakdown of a reflective statement will help to frame its use:

Reflective Statement	Qualifier; Intensifier	Emotion	Situation
I can hear	You are very	Worried about	Needing long-term care

Prioritizing

Prioritizing helps the client break down a complex, multifaceted problem into manageable pieces in order to focus on what is most important.

Ex. “It seems there are a few concerns that you would like to address; however, we may not have time to work on all of these today. Which do you feel is the most important to start working on?”

Focus on Feelings

Focusing on feelings helps clients to get in touch with what they are feeling and lets them know that you have heard them.

Ex. “I hear that you are feeling worried...”

Empathy

Empathy is understanding the feelings of a client and being able to imagine yourself in their situation.

"I can see how this must be frustrating for you..."

Sympathy is a feeling or an expression of pity or sorrow for the distress of the client.

"I'm sorry about your sadness."

Examples of Empathetic Statements

- This sounds like a tough situation.
- It sounds like you have been going through a lot.
- That sounds so frustrating.
- I can see how important this is to you.
- I can imagine this might feel...
- That sounds difficult, let's look and see what we can do to assist with...
- It seems like that would be upsetting.
- That sounds like a rough situation to be dealing with.
- That must have been a pretty painful experience for you, you sound...
- I can only imagine how overwhelming this feels right now.

Support

Throughout a conversation with a client it is important to provide them with support. This means reassuring the client that, given the circumstances, their feelings are understandable.

Ex. “It sounds like you have been trying very hard to cope with this.”

Support provides reassurance and gives the client confidence without making false promises.

De-escalation

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Counselors will have to deal with difficult and challenging situations, such as a very agitated or angry client. De-escalation includes strategies and techniques to help a client to calm themselves. Techniques for counselors include:

- Remain calm; continue to use active listening
- Respond with empathy
- Use short sentences and simple vocabulary; speak calmly
- Do not be defensive
- Define your role
- Set limits in a respectful manner
- Provide choices

“Please tell me more so I better understand how to help you.”

What about frequent callers?

- Many consumer assistance services have frequent callers.
- There can be different reasons why frequent callers contact your service: mental health issues, loneliness and social isolation, memory loss/dementia, etc.
- Listen for genuine needs for referrals within these calls, including referrals to telephone assurance programs, talk/friendship lines, etc.
- While patience and empathy are important components of counseling, it may also be necessary to set clear, easily understood boundaries with some frequent callers.

“I can talk with you for the next five minutes, but you have to agree that this will be your last call today.”

What about callers who are resistant?

For some callers, *nothing works*. Such callers request solutions to their specific situation but reject your input or feel there is no way out of their situation. These callers may be angry, belligerent, or express hopelessness.

- Be polite but firm
- Practice perspective taking (understanding the situation from the caller's point of view)
- Build trust by sharing information
- Be honest; don't make false promises
- Don't argue against resistance
- Offer options; support self-efficacy

Professional TIP
*Use Reflective
Listening*

Additional Communication Tips for People with Difficult Behaviors

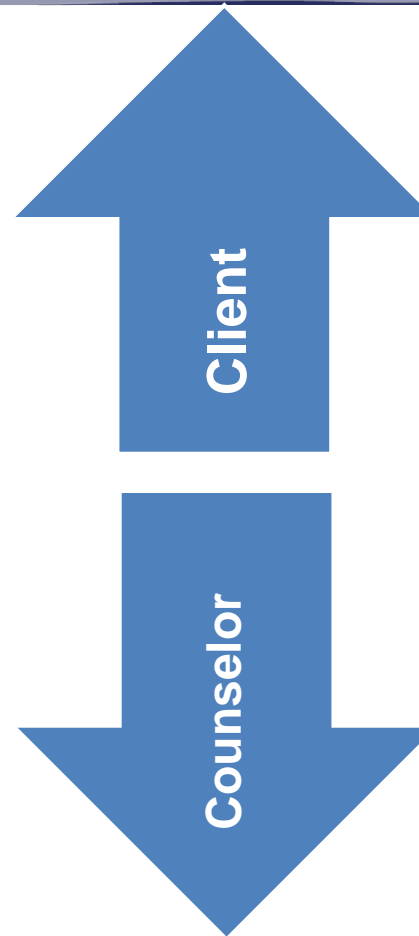
There is no perfect solution for difficult behaviors, but there are strategies to make communication easier.

- Listen for clues about what is contributing to the difficult behavior. Confirm your understanding by paraphrasing what you have heard.
- Use active listening techniques so that people feel heard: paraphrasing, labeling emotions, effective pauses, open-ended questions, validation to advance the conversation (*“You seem really upset. I’d like to hear more about that...”*).
- Explore options. Acknowledge the person’s reality then ask problem-solving questions to introduce options (*“What would be a first step for you?”*)
- A person is more likely to hear information if you have permission to give it (*“Would you like to know... Would you consider... May I suggest... I could share some things that other people have done in this type of situation...”*).
- Offer positive feedback to reinforce steps/actions that have been taken so far.

Tone and Speed of Voice

A counselor should match their own tone of voice and the speed of the conversation with that of the client.

However, when a client seems anxious or upset it is often helpful to use a lower tone of voice and slower pace of speech.



Frenzied tone of voice
– speaking frantically.

Lower tone of voice
– speaking in a calm
manner and slower
pace.

Personable Approach

Keep the conversation personable to give clients the sense that you are a real person making a real connection to the their situation.

A Personable Approach means being friendly without being unprofessional. This is a true “human-to-human” conversation.

How to be personable:

- Use your first name or alias
- Briefly relate to the client’s situation with your own similar life example
- Give the client your uninterrupted attention

Simplicity

Simplicity is important. Use the same types of words as your client. Use short simple sentences and avoid jargon.

- Avoid using acronyms and jargon
- Use short and simple sentences
- Use the same vocabulary as the client
- Limit background noise

Effective Pauses

While long silences can be uncomfortable and should be avoided, effective pauses can be used to help clients gather their thoughts and reflect on what they have just explained.

Effective pauses should:

- Be brief – no more than a few seconds.
- Be used when the client is rushing, seems anxious, or could use time to gather their thoughts.

Sometimes a client's explanation of their situation may become scattered or they may begin speaking about things that are not pertinent to the situation.

Ex. "I wonder if you could tell me a bit more about the situation you mentioned a few moments ago..."

Steering clients back in the direction of the key topics can be useful in understanding their situation.

Open-ended vs. Close-ended Questions

Open-ended questions help the client share their situation.

Allow for longer explanations.

“What brought you here today?”

“What would you like to do about this situation?”

Close-ended questions are used to gather specific information.

Can usually be answered with a “yes,” “no,” or very short answer.

“Are you married?”

“What is your date of birth?”

Avoiding Communication Blocks

Commanding

- *“You cannot do that.”*

Threatening

- *“If you don’t do this, then...”*

Imploring

- *“I wish you would do this.”*

Giving personalized solutions

- *“What I think you should do is...”*

Lecturing

- *“You should not have done that.”*

Judging / Criticizing

- *“You shouldn’t feel this way about...”*

Tips for Effective Communication with Older Adults

Along with key communication techniques, here are additional tips for effective communication with older adults:

- Use Proper Form of Address
- Be Patient and Avoid Rushing the Conversation
- Be Careful about Language
- Be Aware of Cultural and Generational Differences
- Ensure Understanding

One strategy to check for understanding is the “teach-back” method where the counselor asks the client to say what they understand from the conversation.

Tips for Effective Communication with Older Adults

Older adults may have sensory impairments that can affect communication. These tips can help reduce barriers:

- Ensure that your initial greeting includes the name of your agency or service.
- Minimize background noise as much as possible – for you and the client.
- Talk clearly and, if needed, a little slower than usual. Lower the tone (pitch) of your voice.
- If not being understood, try saying the same thing using different words.
- If the client has difficulty with letters and numbers, give a context for them (*“b” as in “boy” or “two” as in “twins”*).
- If possible, offer to follow up or provide additional information in writing.

Additional Tips For Effective Communication with People with Hearing Loss

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Approximately one in three people between the ages of 65 and 74 has hearing loss, and nearly half of those older than 75 have difficulty hearing (National Institutes of Health).

- Don't be afraid to ask *“Are you having trouble hearing me?”* You can also ask *“What can I do to help you hear me or understand me better?”*
- Be sure you are speaking into your headset/telephone mouthpiece/speaker
- Allow enough time for your listener to respond
- Avoid sudden changes in topic
- Avoid sentences that go on too long

Tips for Effective Communication with Older Adults

Cognitive conditions can also affect communication. Tips for serving older adults with such conditions include:

- If needed, help orient the client. Explain or re-explain who you are and your role.
- Provide support and reassurance.
- Use simple, direct wording. Present one question or statement at a time.
- If the client hears you but does not understand you, rephrase what you have said, or provide examples.
- Clients with cognitive impairments may have difficulty coping with open-ended questions. In these cases, consider using close-ended types of questions.

Communication and Disability Awareness

- Listen to the person
- Presume competence
- Talk directly to the person (not their family member, interpreter, attendant, caregiver, guardian, friend, partner)
- Ask what the preferred communication style and mode is, and follow it whenever possible
- Be respectful and nonjudgmental
- Be aware of your own biases and work through them
- Ask before offering assistance, and do not touch an assistive device or service animal without permission

Communication and Disability Awareness

- For individuals with speech and language disorders, be patient and respectful as communication may take longer. Do not interrupt or finish the person's sentence. Ask one question at a time, giving the person time to respond before moving on.
- For individuals with cognitive or intellectual disabilities, avoid complex communication. Use short sentences and complete one topic before moving to the next topic. Ask the person if there is anything they would like for you to clarify. Provide step-by-step guidance if needed with information giving.

Communication and Disability Awareness

When assisting individuals with mental health conditions:

- If a person becomes upset or anxious, speak in a natural, calm tone of voice, repeat necessary information and reassure them
- If a person seems nervous or confused, be willing to break information down step-by-step
- Respect a person's choice of language (how they refer to their own needs)
- Know the local mental health crisis number to contact if needed

Disability Awareness

The Importance of Language

It is important to use appropriate language when speaking to or about consumers with disabilities. Words have power, and using inappropriate or offensive language can have an impact on how consumers relate to you.



Disability Awareness

The Importance of Language

- Two main language styles are generally used to refer to disability:
 - ▣ **Person-first language** (also referred to as people-first language) is based on the idea that disability is only one part of a person. It emphasizes disability as something a person has, rather than something a person is; in other words, disability is seen as one attribute or characteristic of a person. Examples of this include: people with disabilities, individual with cerebral palsy, or child with diabetes.
 - ▣ **Identity-first language** is based on the idea that disability is an inseparable part of a person's identity (much like gender identity or race). It emphasizes disability as a fundamental part of who a person is, rather than an attribute separate from or secondary to the person's identity. Examples of this include: disabled person, blind people, or autistic individuals.

Disability Awareness

The Importance of Language

When speaking with a consumer, it is always best to follow their lead. Although many people prefer person-first language, a growing number of people prefer using identity-first language. Use the words your consumer is using to refer to themselves. If you are unsure of what language to use, it is generally accepted to start with person-first language.

Person-First and Identity-First Language

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Avoid

Handicapped

The disabled

Suffers from
Afflicted with
Stricken by
Victim of

Deaf and dumb
Deaf-mute

Wheelchair-bound
Confined to a wheelchair

Preferred

Person with a disability
Disabled person

People with disabilities
Disabled people

Person with X disability (i.e., person who
had a stroke)
X disabled person (i.e., Autistic person)

Person who is D/deaf or hard of
hearing
D/deaf or hard of hearing person

Person who uses a wheelchair
Wheelchair user

Person-First and Identity-First Language

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Avoid

Crippled; Incapacitated
Invalid; Lame

Midget
(*derogatory term*)

Slow
Retarded (*derogatory term*)

Crazy
Insane
Psycho
Lunatic

Preferred

Person with a physical disability
Physically disabled person

Person of short stature
Person with dwarfism
Little person

Person with an intellectual disability
Intellectually disabled person

Person with a mental or psychiatric
disability
Psychiatrically disabled

Person-First and Identity-First Language

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Avoid

Normal (*in reference to someone without a disability*)

Differently abled
Handicapable
Special needs

Preferred

Non-disabled

Disabled

Communication Exercise

I Know You Believe You Understand

“I know that you believe you understand what you think I said, but I am not sure you realize that what you heard is not what I meant!”

To wrap up, good communication techniques are essential to the process of helping individuals...

Additional Resources for Training



Online Training: NASUADiQ

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Free, online training courses for professionals in the fields of aging and disability. Courses include:

- Strengthening Cultural Competence in I&R/A Work with Asian American and Pacific Islander (AAPI) Older Adults
- Medicaid Managed Care 101
- Medicaid 101: What You Need to Know
- Disability for I&R Specialists
- An Introduction to Elder Abuse
- Adult Protective Services
- Developing Cultural Competence to Serve a Diverse Aging Population
- Essential Components of the Aging I&R/A Process
- Introduction to the Independent Living Movement


Visit <http://www.nasuadiq.org/>



NASUADiQ Online Learning Center

Designed to help strengthen participants' knowledge of the aging and disability networks, our online courses provide overviews and analyses of systems and services that impact older adults, people with disabilities, and their caregivers.

If you experience any technical difficulties, please let us know by contacting adiaz@nasuad.org.

 [Instructional Guide to NASUADiQ.org Online Learning Center](#)




Available courses

 [Adult Protective Services](#) 

This course provides participants with an overview of Adult Protective Services (APS) at the national and state levels. The course explains the services provided by APS and addresses differences between state programs as a result of funding discrepancies. The Elder Justice Act and its impact on APS are also detailed in the course. This training course may benefit individuals who work with older adults or vulnerable adult populations, as well as professionals in APS agencies or other state and local agencies that collaborate with APS.

NAVIGATION

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MAIN MENU

 [Need Assistance?](#)

Monthly Webinars for Aging and Disability Professionals



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Examples of webinars:

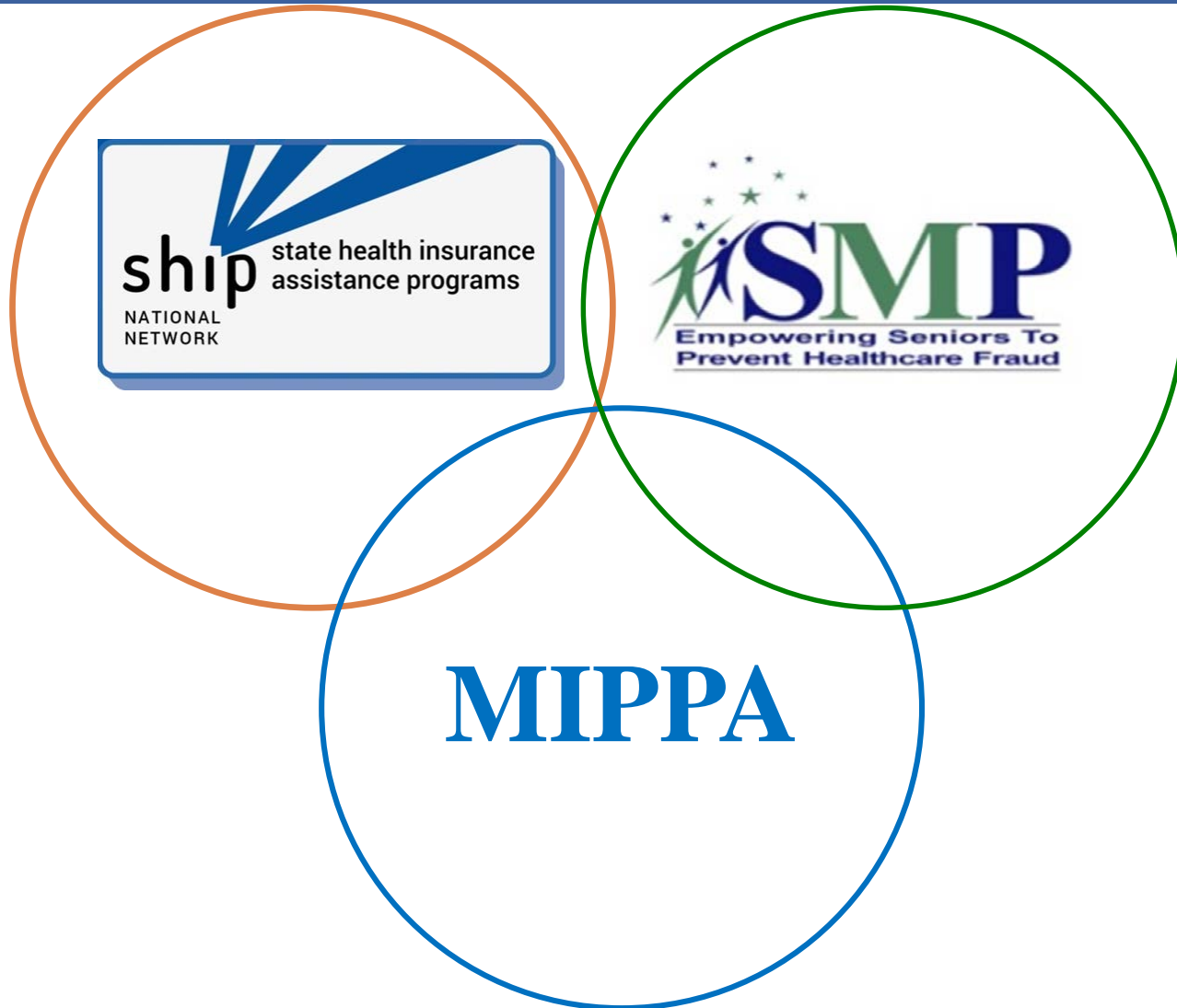
- Building Capacity to Serve Older Adults with Mental Health Conditions (January 19, 2018, Jocelyn Chen Wise, Project Director, Fuqua Center for Late-Life Depression)
- State of the States in Aging and Disability (February 14, 2018, Damon Terzaghi, Senior Director, NASUAD)
- Certification for I&R Specialists in Aging/Disabilities (CIRS-A/D) Webinar Training (September 21, 2017, National I&R Support Center)
- Responding to Elder Abuse: Resources for Information and Referral Programs (June 29, 2017, Maria Shumar and Andy Mao, Elder Justice Initiative, U.S. Department of Justice, and Patrice Earnest, Director, Eldercare Locator, n4a.)
- The Amputee Coalition's National Limb Loss Resource Center: A Critical Tool to Help You Meet the Needs of Your Clients with Limb Loss (March 22, 2017, George Gondo, Director of Research and Grants, the Amputee Coalition)

Visit <http://www.nasuad.org/initiatives/information-and-referralassistance/monthly-calls> for presentations, audio recordings and transcripts.

FOR MORE INFORMATION

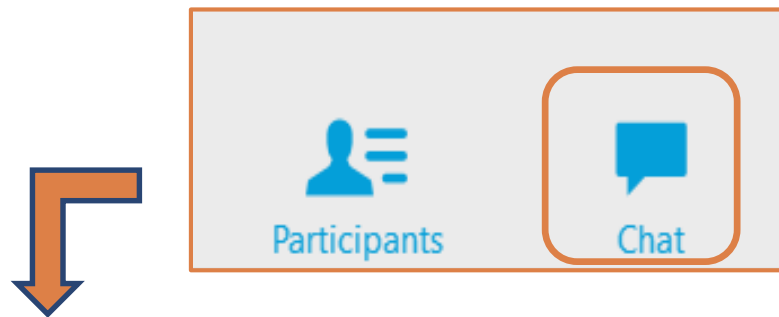
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Resources Reminder



Have Questions?

Please send them through chat:



A screenshot of the chat input interface, enclosed in an orange border. At the top, it says "Send to:" followed by a dropdown menu showing "Host" and a downward arrow. Below this is a large text input field with the placeholder text "Enter chat message here". To the right of the input field is a gray button labeled "Send".

Contacts

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 - ▣ info@shiptacenter.org; 877-839-2675
- SMP National Resource Center (SMP Center)
 - ▣ info@smpresource.org; 877-808-2468
- Center for Benefits Access (MIPPA Center)
 - ▣ centerforbenefits@ncoa.org

Thank you for participating!

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Today's presentation is available for download from within WebEx...



The production of this webinar was supported by grant number 90SATC0001 from the Administration for Community Living (ACL). Its content is solely the responsibility of the SHIP National Technical Assistance Center and does not necessarily represent the official views of ACL.