**Client Meeting (1/31/20)**

SSA - Bob Teller

HHS - Misu Tasnim, Jessica Weeden

* Things to keep in mind
  + Baby boomers, but next generation w/ different needs. Can’t turn off services
  + Should go to SSA to sign up for Medicare to meet eligibility criteria
  + Insurance companies supplement Medicare → interaction b/w private insurance and Medicare
  + Communication primarily through mail, email
  + Beneficiaries’ point of view
    - Use specific examples instead of institutional terms. Ex - “car accident,” “chronic care” instead of “inpatient,” “long term care”
    - Populations of interest: patient and caregiver
* Next steps/goals
  + **Visit Medicare.gov and SSA.gov and see how far we can get** → understand the journey. What is important at the time of sign up for someone to have info about? And what’s the best way to deliver that info?
    - Many 3rd party channels, so think in terms of what Medicare has control over
  + Map IT platform/websites
    - SSA.gov: determine eligibility → then notifies Medicare to give beneficiary a Medicare number
    - Healthcare.gov
    - Medicaid
    - AARP
  + Identify the major dependencies (think pyramid)
    - What is possible and what can we make recommendations about? IT platforms are a major dependency but out of scope
  + Site visit
    - Field office and call centers, mid-late March (operations dept vs. Bob’s CIO dept)
    - Public library/librarians, VA waiting rooms, bus stops, laundromats, community course, senior citizen homes
  + Identify different personas (including in terms of QALYs, etc.)
* Communication
  + 1 joint call or email/week w/ both HHS and SSA +/- 1 individual call w/ SSA
  + Slack