



## **Texas Senior Medicare Patrol Beneficiary Privacy and Conflict of Interest Agreement**

### **Protecting Beneficiary Privacy**

As a Texas SMP volunteer, you may have access to beneficiaries' health information as well as personal identifying information like Medicare numbers and Social Security Numbers. You must handle this information carefully and keep it confidential to protect beneficiaries from fraud, identity theft, health-based discrimination, and other potential problems.

As a SMP Volunteer you agree to:

- Only collect the information you need to provide the help the beneficiary has asked for.
- Only share beneficiary information with people or agencies who are directly involved in providing help to the beneficiary.
- Conduct counseling sessions in private where personal information shared by the beneficiary will not be overheard by others.

### **Conflict of Interest**

Texas SMP volunteers are a trusted resource for Medicare beneficiaries in regards to issues around Medicare fraud and abuse. To maintain that trust, volunteers cannot be allowed to profit in any way from their contacts with beneficiaries. The Texas SMP has adopted several rules to ensure that no volunteer has a conflict of interest that would prevent him or her from providing unbiased counseling.

As an SMP volunteer you agree to follow these rules:

- People who work for organizations that serve Medicare beneficiaries may be Texas SMP volunteers as long as they do not use their position to solicit business of any kind.
- Anyone who is currently associated with the insurance industry cannot use their volunteer participation to provide insurance information or use their volunteer activity to set appointments.
- Anyone who could use their position as a Texas SMP volunteer to solicit business from beneficiaries is restricted from distributing business cards, brochures, and any other materials promoting their personal business.

I have read and agree to the terms and restrictions outlined in this statement.

---

Volunteer

---

Date