Checklist for SHIBA Open Enrollment Counseling

Prior to meeting your client, ask them:

- ☐ To bring all Medicare and plan cards and letters from plan, Social Security, DSHS, etc. (e.g. ANOC, reassignment letter, award letters, etc.).
- ☐ To bring a list of current drugs, including strength and dosage; (Suggest a print-out from the pharmacy, or completed SHIBA Plan Finder Worksheet.)
- ☐ If they have a friend or family member that they want to invite if they need help to remember or understand.
- ☐ Listen carefully to questions and concerns of client. Paraphrase if needed to make sure you understand what they are asking.
- ☐ Complete BCF Beneficiary & Representative and Contact Information and Beneficiary Residence sections. If this is an in-person meeting, ask client to do this.

During your meeting:

- ☐ Complete BCF sections down to Topics Discussed section. If this is an in-person meeting, ask client to do this. Be sure to screen **every** client for MSP and LIS and refer for application assistance if appropriate.
- ☐ Review letters and any pertinent mail.
- ☐ Discuss MA-PD vs. PDP.
- ☐ Run Plan Finder comparison, give or e-mail results to client.
  Point out or highlight costs, drug coverage, usage restrictions, etc., if appropriate.
- ☐ Check to see if they have any other questions.
- ☐ Discuss Next Steps with client. Give them a SHIBA Counseling Report.
- ☐ Other step(s) ____

Note: If you need to, you can check a client's current LIS status with Personalized Plan Finder search, or call Medicare using Unique ID. You can check a client's current MSP status with Voice-Activated call to DSHS.