Welcome to winter!
Medicare Part B Special Enrollment Period (SEP)

February 2022 continuing education

SHIBA trainers
February 2022 training will focus on the Medicare Special Enrollment Period (SEP) for a person working past age 65.

We’re going to work through a series of exercises to learn and share about some aspects of helping a person with this sort of SEP.

Training progression suggestion is to read in this order:
1.  Note to volunteers and VC’s
2.  Intro to 2-part program on SEP
3.  Trainer notes
4.  Organization for enrollment topics
5.  Part 1 SEP packets
6.  PowerPoint program since that is the ‘run of show’ and has the timed agenda
   - You can see where each handout for volunteers comes into play
     - In general, there is a “blank” and “completed” version of each form
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This is a two-part training program:

- February 2022: This first part focuses more on “knowing” things.
- March 2022: The second part will focus more on the skills and abilities needed to apply that knowledge.
### Agenda

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Note: Timing may be adjusted as needed to accommodate this new training format, introductions and checking attendance lists.

Scripting ideas:
- I’m excited to work with you all today.
- We’re going to try something a little different that I think you will find challenging and fun.
- You have a packet of materials. The first handout is a brief note from our Program Manager. Let’s read that over together.
- How about a quick check of the rest of the packet?
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This is a two-part training program. Course objectives will apply for Part 1 as this is more about instruction. Learning objectives will apply for Part 2 will focus on demonstration and application of knowledge.

- February 2022: This first part focuses more on “knowing” things.
- March 2022: The second part will focus more on the skills and abilities needed to apply that knowledge.
Course objectives

1. I know Medicare-eligible beneficiaries may qualify for a special enrollment period (SEP) if they work past age 65.
   • There are specific criteria.
2. I know that the effective date of Part B coverage depends upon several factors, including when and how clients complete their enrollment request.
3. I know that I am expected to gather certain data about the client—both for advising them about their rights and options and for recordkeeping.
4. Based on the facts that a client shares with me, I know how to complete the STARS BCF record accurately and completely.

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The key here is that there are specific rules about who qualifies for the Medicare SEP and what they need to do to enroll on time.

Knowing these is a key to effective counseling.

Note: These are course objectives for information rather than learning objectives, which will require demonstration and we plan to cover in March 2022.

When working with clients, state “Special Enrollment Period” and note that the acronym is SEP.

Notes:
Point 1: Think about the distinction of Part B versus all the other SEP considerations. This is a time to review Medicare & You, page 17.
Point 2: One point could be about filling out the form.
Exercise #1: Review the case study scenario and complete the worksheet

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The first exercise is for you to read over the case study.

Start this this exercise with a review of Medicare & You, pages 17-18, and the definitions and differences for IEP, SEP and GEP.

There are instructions in your packet for how to read for understanding.

I’m going to help us get started.

Please have the case study and the blank worksheet ready.

* Read the first paragraph and make sure people are following along.

Let’s take about 10 minutes to do that, please.
Exercise #2: Meet in groups of 2-3 to discuss your worksheet and ideas

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It’s OK if you finished—even early is OK—and it’s OK if you did not quite finish, too.

What’s next is a chance to talk with another volunteer and share your ideas.

I’m going to make break-out groups for each of you, in groups of two and three.

* Set this up and make sure people are following along.

Let’s take about 20 minutes to do this, please.
Exercise #3: Share some observations with the whole group

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Great job!

Can we please hear from each group: Tell us one thing you noticed about the case that was interesting to you. We’re going to have two minutes per group, please.

Trainers (and VCs) will facilitate the conversation.
Exercise #4: Complete the Beneficiary Contact Form (BCF)

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Friends, it's very important that you record the work you do to help people.

I’d like for us to take about 10 minutes here for you to complete a BCF—there is one in your packet—based on what you know from the scenario as presented.

You’re right that there are things we might know from a real-life conversation that are not here. That’s OK.
Exercise #5: De-brief

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I want to take us all the way back to our course objectives and check in. Did we hit the mark so to speak?

* Review each course objective (see the next slide for a refresher). Ask, “Did we get this right?”
Review of course objectives

1. I know Medicare-eligible beneficiaries may qualify for a special enrollment period (SEP) if they work past age 65.
   - There are specific criteria
2. I know that the effective date of Part B coverage depends upon several factors, including when and how clients complete their enrollment request.
3. I know that I am expected to gather certain data about the client - both for advising them about their rights and options and for record-keeping.
4. Based on the facts that a client shares with me, I know how to complete the BCF accurately and completely.

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Let's do a quick review. Are we better at these course objectives, now?

Trainers will guide the discussion: Read aloud and share how we did this.
Review

- Scenario – highlighted
- Completed worksheet
- Completed BCF

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We may have missed some things here – you let me know.

You have our completed version of the worksheet, based on the scenario, with highlights.

You also have our completed BCF.
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Thank you.

In your packet are some additional resources for your further study and reference.
2022 resources

Medicare Minute Teaching Materials
July 2020
New to Medicare
15 pages
See #7 on page 7
https://www.insurance.wa.gov/media/10677

Or visit SHIPTA Center, login required
https://portal.shiptacenter.org/Portal/Resource-
Detail.aspx?ResourceGUID=9CF560D3-A457-
4268-884F-502472DFCB5F

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The publications are available on My SHIBA as well as from the SHIPTA links on the slide.

Additional resources:
Medicare Rights Center: The Part B Special Enrollment Period
https://www.medicarerights.org/fliers/Part-B-Enrollment/Medicare-Part-
B-SEP.pdf?nrd=1?

How to Apply for Medicare Part B During Your Special Enrollment Period
2022 resources

Part B Special Enrollment Period (SEP)
Supplementary material for Level 3, Course 4: Medicare Late Enrollment Penalties and IRMAA
4 pages
https://www.insurance.wa.gov/media/10678

Or visit SHIPTA Center, login required
https://shipta.medicareinteractive.org/course/level-3-appeals-and-penalties/course-4-enrollment-penalties-and-irmaa
Then click Supplementary materials

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Additional resources:
Medicare Rights Center: The Part B Special Enrollment Period
https://www.medicarerights.org/fliers/Part-B-Enrollment/Medicare-Part-B-SEP.pdf?nrd=1?

How to Apply for Medicare Part B During Your Special Enrollment Period
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Let’s take a quick look at coming attractions.

And we’re asking for your feedback about today’s program, too.
2021-2022 training schedule

2022 Topics

March:
• SEP, Part 2

April:
• SEP dialogue – let’s get better together
• Volunteers ROCK!

May:
• Medigap, Part 1

Topics are subject to change.
Evaluation

Your responses help to improve SHIBA’s training program.

- Did you find today’s training helpful or useful for your SHIBA counseling or outreach?
- What would’ve made this training better for you?

Please take some time to send thoughts to shiba@oic.wa.gov or to your trainer.

Or you may use our brief online survey at https://www.surveymonkey.com/r/SHIBA-TrainingEvaluation.

We appreciate your feedback!
## Photo credits

### Slide 1

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### Slide 17

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