Medicare Savings Programs (MSP) Application Desk Aid

- Go to [www.washingtonconnection.org](http://www.washingtonconnection.org)
- Click “Apply Now”
For SHIBA volunteers only

MSP Application Desk Aid 2

- Click “Close” on “Have you created a SAW Account” pop up
- Click “Next” on bottom right of the page

If you are logged into an account, the information you enter is automatically saved after each page and kept for 90 days. If you do not have an account, you must select the ‘Save and Finish Later’ button and save with a Temporary Access Code.

To apply for Washington Apple Health programs that cover children, parent/caretaker with children, pregnant women, or adults 18 to 64 years old, go to Washington Healthplanfinder by clicking here.

Use the buttons at the bottom of the page to move within the application. If you ever need to return to a specific page, select the page name in the navigation menu below.

The Application for Benefits (UI) allows you to apply for UI benefits

- Have you created a Secure Access Washington (SAW) Account?
  - If not, creating a SAW account allows you to save and finish incomplete applications at a later date. It may also be used to view the status of your application plus access Client Benefit Account information.
Scroll to bottom of page and click “Next”
You may also contact your local Area Agency on Aging (AAA) office.

Repaying the State for Medical and Long Term Care
By law, the State of Washington may recover the costs it paid for certain types of medical services from your estate through Estate Recovery (RCW 41.05A.090, RCW 43.20B.080, and Chapter 182-527 WAC). Estate Recovery doesn’t happen until after your death, and is deferred until the death of your surviving spouse, and your surviving children are age 21 or older. It is also deferred if a surviving child was blind/disabled at your time of death. Recoverable costs include:

- Certain Washington Apple Health long-term services and supports, if you’re age 55 or older at the time you received the services;
- Certain state-only funded services, regardless of your age at the time you received the services.

The State may also file a pre-death lien on your real property, at any age, if you become permanently institutionalized (WAC 182-527-2734). The State may recover from a sale of the property, or your estate, unless:

- Your spouse lives at the property.
- Your sibling lives at the property, is a co-owner, and meets certain conditions.
- Your child lives at the property, and is blind/disabled; or
- Your child lives at the property and is younger than age 21.

You can find a list of services subject to cost recovery under WAC 182-527-2742. You can find a list of assets excluded from recovery under WAC 182-527-2746. Estate Recovery doesn’t apply to services provided under the following Long-term services and support programs:

- Medicaid Alternative Care (MAC)
- Tailored Supports for Older Adults (TSOA)

Race and Ethnic Background Information
Race and Ethnic background information is voluntary and will not affect eligibility or benefit amounts. This information is used to assure program benefits are distributed without regard to race, color, or national origin. For Food Assistance the USDA requires us to answer for you if no information is provided.
- Enter client’s zip code and click “Next”
- Check “Medicare Savings Program,” and click “Yes” on the Attention pop-up box
- Click “Next”
For SHIBA volunteers only

Fill in client’s personal information and click “Next”
○ Add client’s physical and mailing address. Click “Next”
- Click “Add More” to list any additional people that live in the client’s home.
- If list is complete, click “Next”
Enter client’s contact information. Click “Next”
- Enter client’s self-reported total monthly income (including pension, social security, annuities, etc.)
- Enter total amount of cash and money in client’s bank accounts
- Enter client’s monthly rent
- Select “At Home” if the client lives on their own
- Click “Next”
- Ask the client the following questions and select their answers.
- Click “Next”
For SHIBA volunteers only

- Ask the client the following questions and select their answers. Click “Next”
- If client has Medicare, select “Yes” for question “Covered by health insurance?” and select “Other” and enter their Medicare information. Click “Next”

DSHS Client ID number (if any)

Covered by health insurance?
(Including Tricare or Long-Term Care Insurance)

☐ Yes ☐ No

(Check all that apply)
☐ Tricare
☐ Long Term Care
☒ Indian Health Services
☐ Other

Who is the insurance with?

Who is the policy holder?

What is the policy number?

U.S. Citizen?
☐ Yes ☐ No

Washington State resident?
☐ Yes ☐ No

Living outside the state of Washington?
☐ Yes ☐ No

If Hispanic or Latino, select from list
Race (select up to 5 that apply):
☐ White
☐ Black or African American
☐ Asian
☐ Other Pacific Islander
☒ American Indian / Alaskan Native
☐ Asian Indian
☐ Cambodian
☐ Chinese
☐ Filipino
☐ Japanese
☐ Korean
☐ Laotion
☐ Thai
☐ Vietnamese
☐ Samoan

Medicare

Client Name

Medicare Number

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○ Ask the client the following questions about all other income and specify all sources of income in the pop-up box. Click “Next”
○ Ask client for information on all types of vehicles and enter details in the pop-up box. Click “Next” when complete.
- Ask client for information on all assets and include details in the pop-up box. Click "Next" when done.
- Ask client the following question and answer select their answer. Click “Next”
For the first question, select “Other” and type in “SHIBA.” Click “Next”
- Review application for accuracy with client and then click “Next”
- Scroll to bottom of the page and click “Yes.” Click “Next”

The State may also file a pre-death lien on your real property, at any age, if you become permanently institutionalized (WAC 182-527-2820). The State may recover from a sale of the property, or your estate, unless:

- Your spouse lives at the property;
- Your sibling lives at the property, is a co-owner, and meets certain conditions.
- Your child lives at the property, and is blind/disabled; or
- Your child lives at the property and is younger than age 21.

- You may be restricted to one health care provider, pharmacy, and/or hospital if you seek out unnecessary health care services from providers.

I have read and understood Health Care Coverage Rights and Responsibilities  Yes ☐ No ☐
- Have client read “State/Federal Program Declaration.”
- Select “Yes” to apply for services
Under “Start Next Quarter Consent,” click “No” if your client does not want to apply for free/reduced tuition.
o Enter client’s full name, the captcha phrase, and click “Submit Application.”
o Optional: you can enter your name under “Who helped you fill out this form?”
Print this confirmation page for your client and also print a copy of the application if they would like a copy.

The client can wait for DSHS to call to schedule their interview or the client can call DSHS to schedule a “Medicare Savings Program interview” with DSHS: 877-501-2233
- In **STARS** or on BC (Beneficiary Contact) form, check “Yes” for “MIPPA” (first question on BC)

- Scroll down to **Topics Discussed**, and under “Medicaid,” check “MSP Application Assistance”
If you help a client submit a MSP application, please ask your Volunteer Coordinator for your agency’s protocol on tracking MSP application data:

**Sponsor:**

**Volunteer Coordinator:**

**Protocol for tracking MSP applications:**