

Training

Statewide Health Insurance Benefits Advisors (SHIBA)

Volunteer advisor resources

- February 2018 homework review
- Volunteer advisor binders
- Resources including new handouts

March 2018 volunteer training

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Volunteer learning objectives

After completing the March 2018 monthly training, volunteer advisors and volunteer coordinators will be able to:

- ✓ Assist a client with a first level of appeal including collecting necessary complaint details.
- ✓ Identify priority reference sources for your binder.
- ✓ Put together or update an advising binder with recommended QRCs and resources.
- ✓ List different types of Medicare resources and examples of each.

Handouts for this training packet

1. Medicare.gov and MyMedicare.gov postcard
2. You're Getting a New Medicare Card pad sheets
3. Volunteer advisor binder mandatory documents, see pages 5-7 for the list

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Troubleshooting and sharing time

Please take some time to share with your group.

Review:

- February homework, see page 4
- SHIBA complaints, grievances and appeals along with examples of each

February homework

DEPARTMENT OF HEALTH AND HUMAN SERVICES
CENTERS FOR MEDICARE & MEDICAID SERVICES

MEDICARE REDETERMINATION REQUEST FORM — 1ST LEVEL OF APPEAL

1. Beneficiary's name: Elvis H. Presley
2. Medicare number: 324-86-1234A
3. Item or service you wish to appeal: Destruction of Skin Growth - on Eyelid
4. Date the service or item was received: Jan. 21, 2013
5. Date of the initial determination notice (please include a copy of the notice with this request):
(If you received your initial determination notice more than 120 days ago, include your reason for the late filing.)
I got it in April.
- 5a. Name of the Medicare contractor that made the determination (not required):
Noridian
- 5b. Does this appeal involve an overpayment? Yes No
(for providers and suppliers only)
6. I do not agree with the determination decision on my claim because:
the doctor told me he could remove the spot on my eyelid since it bothered me.
7. Additional information Medicare should consider:
My eyelids are a big problem (they drop down over my eyes) and I decided to not have surgery to correct this
8. I have evidence to submit. Please attach the evidence to this form or attach a statement explaining what you intend to submit and when you intend to submit it. You may also submit additional evidence at a later time, but all evidence must be received prior to the issuance of the redetermination.
 I do not have evidence to submit.
9. Person appealing: Beneficiary Provider/Supplier Representative Shiba helped me.
10. Name, address, and telephone number of person appealing: Elvis Presley
P.O. Box 1234 Euphoria, WA 98888 360-929-5862
11. Signature of person appealing: Elvis Presley
12. Date signed: May 15, 2013

PRIVACY ACT STATEMENT: The legal authority for the collection of information on this form is authorized by section 1869 (a)(3) of the Social Security Act. The information provided will be used to further document your appeal. Submission of the information requested on this form is voluntary, but failure to provide all or any part of the requested information may affect the determination of your appeal. Information you furnish on this form may be disclosed by the Centers for Medicare and Medicaid Services to another person or government agency only with respect to the Medicare Program and to comply with Federal laws requiring or permitting the disclosure of information or the exchange of information between the Department of Health and Human Services and other agencies. Additional information about these disclosures can be found in the system of records notice for system no. 09-70-0566, as amended, available at 71 Fed. Reg. 54489 (2006) or at <http://www.cms.gov/PrivacyActSystemofRecords/downloads/0566.pdf>

Form CMS-20027 (12/10)

Volunteer advisor binder core documents

You've been waiting! All your great January and February feedback was reviewed, tabulated and prioritized. We collected over 200 suggestions from volunteers for materials to include in your binders. SHIBA staff determined the following documents are the minimum "must haves" for your advising binders. You will certainly have more you want to add.

Today we'll start organizing your binders with the documents you discussed as a group and that SHIBA staff determined you should have with you when you're advising a client.

Keep your materials in a three-ring binder or accordion file...whatever works best for you. We have a few extra on hand.

Let's take some time to review SHIBA's top resource document list and to make sure your binder or folder of materials is organized and current. Note the documents that are only links and those that are available from your Volunteer Coordinator (VC).

1. 2018 Medicare Advantage and Special Needs plans and prices by county (copies available from your VC)
www.insurance.wa.gov/2018-medicare-advantage-and-special-needs-plans-and-prices-county
2. 2018 Medicare hospital insurance (Part A) and medical insurance (Part B) covered services
www.insurance.wa.gov/sites/default/files/documents/2018-medicare-parts-a-b-chart.pdf
3. 2018 Medicare Part D Stand-Alone prescription drug plans
www.insurance.wa.gov/sites/default/files/documents/2018-medicare-standalone-plans.pdf

4. Approved Medicare Supplement (Medigap) plans
www.insurance.wa.gov/sites/default/files/documents/medicare-supp-plans.pdf
5. 2018 Extra Help/LIS Co-pay Levels & Costs
www.insurance.wa.gov/sites/default/files/documents/extra-help-lis-levels-costs.pdf
6. Cross-Agency Desk Aid
www.insurance.wa.gov/sites/default/files/documents/cross-agency-desk-aid.pdf
7. Disability Basics
www.insurance.wa.gov/sites/default/files/documents/disability-basics.pdf
8. Find a local SHIBA office (available only as a web link)
www.insurance.wa.gov/find-local-shiba-office
9. Get Help paying for Medicare
www.insurance.wa.gov/sites/default/files/documents/get-help-pay-for-medicare-brochure.pdf
10. Guide to consumer mailings from CMS, Social Security & plans in 2017 / 2018
www.insurance.wa.gov/sites/default/files/documents/guide-consumer-mailings_0.pdf
11. Medicare & You 2018 (copies available from your VC)
www.medicare.gov/pubs/pdf/10050-Medicare-and-You.pdf
12. Medicare help rainbow chart
www.insurance.wa.gov/sites/default/files/documents/medicare-help-rainbow-chart.pdf
13. Medicare Part D Prescription Drug Benefit in 2018
www.ncoa.org/resources/donut-hole-the-medicare-part-d-coverage-gap-illustrated/

14. Medicare's Limited Income NET Program
www.insurance.wa.gov/sites/default/files/documents/medicare-limited-income-net-program.pdf
15. Other State Health Insurance Information Programs (SHIP)
www.insurance.wa.gov/sites/default/files/documents/other-state-health-insurance-programs.pdf
16. People with Medicare and retiree or other health care coverage
SHIBA is working on a QRC to put online. For now please see the handout.
17. SHIBA and PEBB Ways SHIBA volunteers can assist PEBB retirees
www.insurance.wa.gov/sites/default/files/documents/shiba-pebb_0.pdf
18. Special Enrollment Periods for Medicare Advantage Plans and Medicare Part D Drug Plans
www.medicareinteractive.org/pdf/SEP-Chart.pdf
19. Understanding Medicare Part C and Part D Enrollment Periods
www.medicare.gov/Pubs/pdf/11219-Understanding-Medicare-Part-C-D.pdf
20. Using your Medicare SHIP Unique ID
www.insurance.wa.gov/medicare-unique-ids
21. Volunteer Complaint Process
www.insurance.wa.gov/sites/default/files/documents/volunteer-complaint-process.pdf
22. Your Guide to Who Pays First
www.medicare.gov/Pubs/pdf/02179-Medicare-Coordination-Benefits-Payer.pdf
23. Your Medicare coverage choices (copies available from your VC)
www.insurance.wa.gov/sites/default/files/documents/your-medicare-coverage-choices.pdf

Resources

There are many ways to gather information for help with advising clients, including websites, flyers, brochures, websites, working with other agencies. *Always be careful not to give out information if you are not sure of the accuracy. When in doubt check with your volunteer coordinator or Regional Training Consultant.* Below are a couple more handouts and some websites to help you with advising others.

New client materials;

You're Getting a New Medicare Card!



You're Getting a New Medicare Card!

Medicare will mail new Medicare cards between April 2018 – April 2019. Your card will have a new Medicare Number instead of a Social Security Number.

Make sure your mailing address is up to date so you get your new card. Visit ssa.gov/myaccount or call 1-800-772-1213 (TTY: 1-800-325-0778) to correct your mailing address.

Visit Medicare.gov for the latest updates.

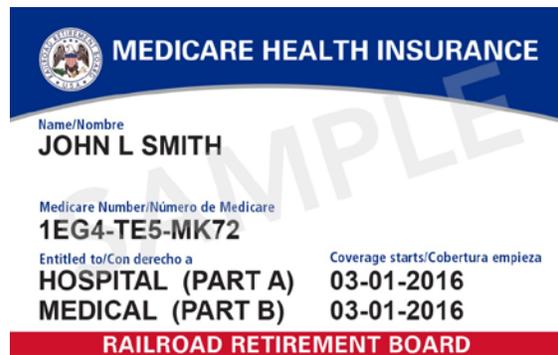
 CMS Product No. 12006 August 2017

One-sided pad of information sheets.



- Product Ordering:
- You're Getting a New Medicare Card
- CMS product number 12006
- productordering.cms.hhs.gov

Note: Since the last monthly training, we learned that Washington state Medicare beneficiaries will start receiving their new Medicare cards after June 2018. As well, the Railroad Retirement Board (RRB) will issue the new Medicare cards to its RRB beneficiaries.



MEDICARE HEALTH INSURANCE

Name/Nombre
JOHN L SMITH

Medicare Number/Número de Medicare
1EG4-TE5-MK72

| | |
|---------------------------|-----------------------------------|
| Entitled to/Con derecho a | Coverage starts/Cobertura empieza |
| HOSPITAL (PART A) | 03-01-2016 |
| MEDICAL (PART B) | 03-01-2016 |

RAILROAD RETIREMENT BOARD

“Visit MyMedicare.gov” postcard



This two-sided postcard provides at-a-glance general information about:

- mymedicare.gov
- Medicare in general
- Needing personalized Medicare information



Source: www.medicare.gov/Pubs/pdf/11584.pdf

Available through the CMS Product ordering Website in English and Spanish: productordering.cms.hhs.gov

Websites

Googling does not always lead to reliable and trusted sources and sites. Make sure if you decide to use information off of the web that it's accurate before you pass the information on to clients. Following is a list of reliable and trusted websites:

- Office of the Insurance Commissioner: www.insurance.wa.gov, www.insurance.wa.gov/my-shiba
- Medicare.gov: www.medicare.gov
- Centers for Medicare & Medicaid Services: www.cms.gov
- United States Social Security Administration: www.ssa.gov
- Washington State Health Care Authority: www.hca.wa.gov
- Medicare Rights Center: www.medicarerights.org

- National Council on Aging: www.ncoa.org
- The SHIP National Technical Assistance Center:
www.shiptacenter.org

Website advising example: Since many people now enrolling into Medicare are used to looking at their Explanation of Benefits (EOBs) online, they like mymedicare.gov to look at their Medicare Summary Notices (MSN's). Notices only get mailed quarterly unless beneficiaries call 1-800-MEDICARE to request the MSN to be printed and mailed. This only applies to people on Original Medicare A and B.

My SHIBA

How to get to My SHIBA:

1. Go to the Insurance Commissioner website: www.insurance.wa.gov
 - a. Scroll all the way to the bottom of the page
 - b. Click on "SHIBA Volunteers only"
 - c. You will see a place to log into My SHIBA
 - d. Enter this password in the space: Document1234
 - e. Hit the enter button on your computer keyboard.

2. The system sees your "cookie" (a small amount of data about you the website generates that your web browser saves) so the next time you login into My SHIBA, it may just skip the login screen and take you directly to the My SHIBA webpage. This is okay. However, if you ever clean out your cookies, the system will then prompt you to enter the password in the login screen.

Tip: You can save the My SHIBA homepage in your favorites to bookmark it.

Additional help

There are many more websites and resources, including ordering materials from CMS, YouTube videos, make-up webinars and documents available on My SHIBA.

If you ever have questions, be sure to consult with your Volunteer Coordinator, Regional Training Consultant or another SHIBA staff member. Your February 2018 training materials provide a good reference section on this topic.

Volunteer advisor activity

Take some time as a group to talk about the core resource documents.

Activity:

Share with your colleagues where you would find the following information online:

- Open enrollment dates for 2018
- How to file a SHIBA complaint
- What are the current approved Medicare supplement plans
- What are the basic differences between Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI)

What are some other topics that you encounter frequently that you want resources on? What other tips and favorite documents can you share?

Future training

Transitioning from SHIBA Online to STARS

SHIBA will transition to a new data reporting system called “STARS” later this year to replace SHIBA Online. We will provide you with lots of training to help you with the new system. This will be a valuable new resource with plenty of support from the SHIP TA Center and consistent system updates. It will be easier to use and we’ll be able to upload documents. Stay tuned for more information to come!

VRPM update

Calendar highlights:

- February – July 2018
 - Develop section 3.0 Volunteer Program Management
 - Planning and training for RTCs and VCs
- August – December 2018
 - All policies updated into the Volunteer Handbook and Sponsor Operations Manual
 - Training of VCs and Volunteer Advisors on new policies
 - Training will be a part of Basic Training thereafter

Thanks to everyone who provided feedback on your agency policies along with questions and comments.

Review

We’ve covered:

- February SHIBA complaint homework
- Volunteer advisor binders
- Volunteer advisor resources

Reminders

Please fill out the training evaluation.

Future months will be a variety of in-person and distance education-based training. We'll be coordinating with the RTCs, VCs, and sponsors to help ensure successful long-distance training.

**We've been reading through your comments and value your feedback.
We are looking at ways we can improve the training...thank you!**

New things we are developing:

1. VRPM training
2. STARS training (replacing SHIBA Online)
3. Resource lists that include phone numbers and contact information for various Medicare resources
4. Tips on how to use the *Medicare and You* handbook
5. Top list of ideas for training
6. Additional resources for advising binders.

**Please contact your RTC or Diana at
dianas@oic.wa.gov with any questions or ideas!**

Take-home activity: Word find

The word list is on the next page.

Medicare

C P F Y X G A P M D U A R F V
S A P N Q R C T X J D I Q C I
N T D O S T A R S J N C G B V
F H R K P A G I D E M P X A E
C F S F D V O L U N T E E R T
T I E L C I H U G U M V Q M E
N N G R I E V A N C E N X V R
I D P T C P A R T D T C C K A
A E Y R A L L I C N A O Q J N
L R C N T P X Q A E X B I O V
P P E B B T A B I H S R O D K
M V R P M L T C E S I A H J C
O G E T E R A C I D E M N S N
C G T N E M E L P P U S M H F
C S A Y E N R O L L M E N T Y

Word Find list of Medicare terms

- | | |
|---------------|----------------|
| 1. Ancillary | 11. Pathfinder |
| 2. Cobra | 12. PEBB |
| 3. Complaint | 13. QRC |
| 4. Enrollment | 14. SHIBA |
| 5. ESRD | 15. SNF |
| 6. Fraud | 16. STARS |
| 7. Grievance | 17. Supplement |
| 8. Medicare | 18. Veteran |
| 9. Medigap | 19. Volunteer |
| 10. Part D | 20. VRPM |

Source: edtools.mankindforward.com/word_searches/18588/generate

Training course evaluation

Date of Training: _____ Training Location: _____

How can SHIBA improve the monthly trainings?

What additional trainings within our SHIBA scope would you like to see?

What SHIBA training materials (including QRCs) would you like to see added to My SHIBA?

Other: _____

Optional: If you would like to be contacted, please provide your name and contact information. Someone in our office will contact you. Thank you!

Name: _____

Day Phone: _____ Email: _____

If you prefer to give electronic feedback about curriculum or training, please contact: Diana Schlesselman: dianas@oic.wa.gov or Liz Mercer: lizm@oic.wa.gov.

Notes:
