

Quick desk reference for OEP and general counseling

This job aid is a quick desk reference to use during Open Enrollment and for general counseling.

Note: SHIBA documents that have “media/####” in the link (for example [media/1806](#) in the first row below) should link to the most current version. Be sure to check the date on the document and check with your volunteer coordinator if you have questions.

Reference material	Links and information
10 Standardized Medicare Supplement (Medigap) plans chart	https://www.insurance.wa.gov/media/1806 SHP521-SHIBA -Medigap- plans
Approved Medicare Supplement (Medigap) plans	https://www.insurance.wa.gov/media/1807 Medigap chart (by quarter)
2022 Medicare Advantage and Special Needs Plans (SNPs)	https://www.insurance.wa.gov/2022-medicare-advantage-and-special-needs-plans-snps
2022 Medicare Part D stand-alone prescription drug plans	https://www.insurance.wa.gov/media/10395 Part D Plans SHP839
Calling the Health Care Authority Medicaid Phone System	https://www.insurance.wa.gov/media/1720
Comparing Medicare Supplement (Medigap) and Medicare Advantage plans	https://www.insurance.wa.gov/media/1808
CMS guide to agent/broker behavior	https://www.cms.gov/files/document/agentbroker-dos-donts-92021.pdf
Counseling Medicare clients: Open Enrollment-related	https://www.insurance.wa.gov/counseling-medicare-clients
Extra Help/LIS copay levels & costs	https://www.insurance.wa.gov/media/6514
Guide to Mailings from CMS, Social Security, and Plans (Guide to Consumer mailings)	https://www.cms.gov/Outreach-and-Education/Outreach/Partnerships/Publications-for-Partners-Items/CMS1232457
Guide to ordering publications through Fulfillment	https://www.insurance.wa.gov/sites/default/files/documents/order-publications-guide.pdf
Link to the Medicare page that has the materials in multiple languages.	https://www.cms.gov/Outreach-and-Education/Reach-Out/Find-tools-to-help-you-help-others/Open-Enrollment-materials-for-other-audiences

Prep and materials for OEP counseling sessions

Reference material	Links and information
Medicare & You	https://www.medicare.gov/Pubs/pdf/10050-medicare-and-you.pdf
Medicare Help Rainbow Chart	https://www.insurance.wa.gov/media/5711
Medicare Open Enrollment Period (OEP) Timeline	https://www.insurance.wa.gov/media/6901
Medicare Open Enrollment Tools	https://www.insurance.wa.gov/medicare-open-enrollment-tools
Medicare Part A and B Covered Services	https://www.insurance.wa.gov/media/10536 SHP520FR-SHIBA Part A&B
Medicare Script, Medicare minute	https://portal.shiptacenter.org/Login.aspx Login required
Plan Finder	Explore your Medicare coverage options https://www.medicare.gov/ 2021 How to use Medicare Plan Finder, step-by-step https://www.youtube.com/watch?v=LpWr3MiDjMQ
Setting up a Medicare Plan Finder online user account	https://www.insurance.wa.gov/sites/default/files/documents/plan-finder-account-creation.pdf 9-01-2020/SHIBA874
Referral Resources For other state agencies and for other organizations.	Cross agency desk aid https://www.insurance.wa.gov/media/1721 People with Medicare and retiree or other health care coverage https://www.insurance.wa.gov/media/1733
Your Medicare Coverage Choices	https://www.insurance.wa.gov/media/1598 SHP856-Your Medicare-coverage-choices
Your SHIBA Medicare Action Plan	https://www.insurance.wa.gov/media/1541 SHP855-SHIBA-Medicare-action-plan