# Checklist for SHIBA Open Enrollment counseling

**To help your clients prepare for an Open Enrollment counseling session, ask them:**

☐To collect all Medicare and plan cards, and letters from their plan, Social Security, Department of Social and Health Services (DSHS), etc. Be sure to ask for Annual Notice of Change (ANOC), reassignment letter, award letters, etc.

☐Do they already have (or can they set up) a personalized account on Medicare.gov? If so, please have their login information handy. ***Or*** they may prepare a list of current drugs, including dosage and quantity. You may suggest:

- They obtain a print-out from the pharmacy **or**
- Complete a SHIBA Plan Finder worksheet

☐ Do they have a friend or family member that they want to invite for help or support?

**During your meeting:**

☐ Listen carefully to the client's questions and concerns. Be sure to find out what their current coverage is, if applicable. Paraphrase if needed to make sure you understand what they are asking.

☐ Be sure to screen **every** client for Medicare Savings Program (MSP) and (Low Income Subsidy (LIS) and refer for application assistance if appropriate.

☐ Review letters and any pertinent mail.

☐ Discuss Medicare Advantage plan with Part D coverage (MA-PD) vs. Prescription Drug Plan (PDP), if applicable.

☐ Run a Plan Finder comparison, hand over or email results to client. Point out or highlight costs, drug coverage, usage restrictions, etc., if appropriate.

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☐ Check to see if they have any other questions.

☐ Discuss next steps with client. For example, what other information do they need? Do they know how to enroll? If they are ready to enroll, the client can do so on the Plan Finder or you may help them. Consider using the Your SHIBA Medicare Action Plan form to help the client with gathering their information.

**After your meeting:**

☐ Complete the Beneficiary Contact.

☐ Other step(s) or follow-up: ______________________________

Note: If you need to, you can check a client's current LIS status with their personalized account, or call Medicare using your Unique ID. You can check a client's current MSP status by calling the Health Care Authority Medicaid phone system.