



## Getting ready for Medicare Open Enrollment and using Plan Finder

*September 2021 continuing education*



Updated September 9, 2021

### **Updates to this version**

- Slides 10-15: Updated to 2021/2022 version of the Guide to consumer mailings from CMS.
- Slide 24: Deleted a duplicate web link.
- Slide 43: Updates picture for the 2022 version of Medicare & You.

## Agenda

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- Learning objectives: You should you be able to complete Open Enrollment and Plan Finder training goals after today's continuing education.
- What's new?
- Sharing time
- Open Enrollment overview
- Plan Finder
- Wrap-up



### **SHIBA trainers**

#### **Here are some training ideas:**

- Introduction, timeline, job aids, plan finder, enrollment, and/or letters.
- Getting ready for Medicare Open Enrollment: Placeholder for VCs to have 15-30 minutes to share and plan in their area.
- Mechanics of Plan Finder: Optional or watch other webinars. RTCs to decide how to approach this in their area depending on needs.

## Learning objectives: OEP overview

- Explain the [major events and timing](#) of Open Enrollment [starting in September 2021](#).
- If information is available, learn about any changes for 2022.
- Explain what choices clients can make during Open Enrollment.
- Explain enrollment periods that happen from September through March and how they apply to a client's situation.
- Define steps to cover when counseling clients about Open Enrollment options.
- Share SHIBA role with PEBB and other retiree plan assistance.



### **SHIBA trainers**

Links on the slide:

- "Major events and timing" links to:  
Guide to consumer mailings from CMS, Social Security, & plans in 2020/2021  
<https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf>
- "Starting in September 2021" links to:  
2021 – 2022 Medicare Open Enrollment Period (OEP) timeline  
[https://www.insurance.wa.gov/sites/default/files/documents/medicare-oep-timeline\\_3.pdf](https://www.insurance.wa.gov/sites/default/files/documents/medicare-oep-timeline_3.pdf)

## Learning objectives: Plan Finder

- Perform a [personalized](#) or general search of Medicare Part D and Part C plans for clients.
- Identify a client's [current](#) coverage using the Plan Finder tool.
- [Enter a client's drugs](#) into the Plan Finder tool.
- Identify the top plan options for clients based on cost and benefits.
- Identify pertinent health insurance information from the Plan Finder tool.
- Explain a client's health insurance options, costs and benefits using Plan Finder printouts.
- Share printout information electronically, in person or by US mail.



### **SHIBA trainers**

Links on the slide:

- "Personalized" links to:  
Setting up a Medicare Plan Finder online user account  
<https://www.insurance.wa.gov/sites/default/files/documents/plan-finder-account-creation.pdf>
- "Current" links to:  
Setting up a Medicare Plan Finder online user account  
<https://www.insurance.wa.gov/sites/default/files/documents/plan-finder-account-creation.pdf>
- "Enter a client's drugs" links to:  
Medicare PlanFinder worksheet  
<https://www.insurance.wa.gov/sites/default/files/documents/medicare-planfinder-worksheet.pdf>

## What would you like to share? (15 minutes)

- VC may share any updates.
- Volunteers are welcome to share anything!



Photo by CJ Dayrit



### **SHIBA trainers**

- This time is for your VC or sponsor to share relevant updates with the group.
- It also gives volunteers time to ask questions of the VC or request needed materials.
- Remind volunteers this is NOT the time to share or ask for help with client cases. Time for asking for help with client cases may be shared at the end of CE.

# Open Enrollment overview



# Job aid: Medicare OEP timeline

## 2021-2022 Medicare Open Enrollment Period timeline

- Provides OE timeline planning for Sept. 2021 through March 2022.
- A larger version is on the next two slides.
- The full version is on [My SHIBA](#).
- Two pages.
- <https://www.insurance.wa.gov/media/6901>

Date	Event
Early September	The Social Security Administration will verify if some Extra Help recipients are still eligible ("Grey Notice"). These recipients must reply or they'll lose their coverage at the end of 2021.
Late September	CMS mails the <b>Medicare &amp; You</b> handbook.
September 30	Current plan members must receive Annual Notice of Change (ANOC).
October 1	Insurers may start marketing plans for 2022. <ul style="list-style-type: none"><li>• <b>TENTATIVE</b> date Medicare posts 2022 plan and drug benefit data on the Medicare Plan Finder.</li></ul>
October 2	People whose 2021 plan is leaving the Medicare program in 2022 must get notices from plans.
Early October	<b>TENTATIVE</b> enrollment for SHIBA to share 2022 plan lists.
October 15	<ul style="list-style-type: none"><li>• Last date employer/union and other group health plans must tell enrollees whether or not their drug coverage is creditable.</li><li>• <b>2021 Annual OEP starts.</b></li></ul>
November 1 - 30	2021 Open Enrollment changes effective Jan. 1, 2022.
December 7	<b>2021 Annual OEP ends.</b>
December	Social Security Benefit Rate Change Notice - informs people about benefit changes and Medicare premiums due to cost-of-living increases, etc.

Continued on back

Contact SHIBA | 1-800-942-0300 | [shiba@ins.wa.gov](mailto:shiba@ins.wa.gov)

For training purposes only - do NOT share with consumers.



### SHIBA trainers

Take a little time to review the job aid, discuss and answer any questions if needed.

The 2021-2022 Medicare Open Enrollment Period timeline document may be found by doing search on My SHIBA for "Medicare open enrollment period timeline".

You may either link to the My SHIBA version of the document or use the versions on the next two slides for reference in case you are unable to access the My SHIBA site.

# 2021-22 Medicare OEP timeline

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<https://www.insurance.wa.gov/media/6901>

## 2021 – 2022 Medicare Open Enrollment Period (OEP) timeline

2021	
<b>Early September</b>	The Social Security Administration will verify if some Extra Help recipients are still eligible ("Grey Notice"). These recipients must reply or they'll lose their coverage at the end of 2021.
<b>Late September</b>	CMS mails the <b>Medicare &amp; You</b> handbook.
<b>September 30</b>	Current plan members must receive Annual Notice of Change (ANOC).
<b>October 1</b>	<ul style="list-style-type: none"><li>Insurers may start marketing plans for 2022.</li><li><b>TENTATIVE</b> date Medicare posts 2022 plan and drug benefit data on the Medicare Plan Finder.</li></ul>
<b>October 2</b>	People whose 2021 plan is leaving the Medicare program in 2022 must get notices from plans.
<b>Early October</b>	<b>TENTATIVE</b> timeframe for SHIBA to share 2022 plan lists.
<b>October 15</b>	<ul style="list-style-type: none"><li>Last date employer/union and other group health plans must tell enrollees whether or not their drug coverage is creditable.</li><li><b>2021 Annual OEP starts.</b></li></ul>
<b>November 1 – 30</b>	PEBB Open Enrollment, changes effective Jan. 1, 2022.
<b>December 7</b>	<b>2021 Annual OEP ends.</b>
<b>December</b>	Social Security Benefit Rate Change Notice – informs people about benefit changes and Medicare premiums due to cost-of-living increases, etc.



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## 2021-2022 Medicare Open Enrollment Period timeline

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<https://www.insurance.wa.gov/media/6901>



# 2021-22 Medicare OEP timeline

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<https://www.insurance.wa.gov/media/6901>

2022	
January 1	Changes made during OEP take effect.
January 1 – March 31	Medicare Advantage OEP occurs.
If client has:	Clients have a one-time option to switch to:
A Medicare Advantage plan with or without drug coverage	A different Medicare Advantage plan with drug coverage OR A different Medicare Advantage plan without drug coverage OR Original Medicare and a Part D plan OR Original Medicare without a Part D plan
Original Medicare with or without a Part D plan	Clients cannot switch their plan during this time.
Changes made take effect the first day of the month after the plan gets the client's request.	



## 2021-2022 Medicare Open Enrollment Period timeline

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<https://www.insurance.wa.gov/media/6901>

# Job aid: Guide to mailings

## Guide to consumer mailings from CMS, Social Security & plans in 2021/2022

- Also known by SHIBA as “the guide to colorful letters.”
- See full version on the next five slides and also on [CMS.gov](https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf).
- Five pages.
- <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf>

Mail date	Sender	Mailing/letter	Main message	Consumer action
Mid-May	Social Security	Social Security ID and WEP Outreach Notice (SSA Form No. 10-1080)	Inform people who may be eligible for Medicare and Social Security benefits about their Social Security ID and WEP Outreach Notice.	Check for errors and report them to Social Security.
Early September	Social Security	Social Security Notice to Review Eligibility for Extra Help (SSA Form No. 10-1080)	Inform people who may be eligible for Medicare and Social Security benefits about their Social Security ID and WEP Outreach Notice.	Check for errors and report them to Social Security.
September	Plans	Plan Annual Notice of Change (ANOC) and Evidence of Coverage (EOC) (HHS/DOH)	In September, all people who qualify for Medicare will get a notice from their current plan telling them about changes to their plan for the next year.	Review changes to decide whether the plan will continue to meet your needs for care.
September	Plans	Plan CD-Rider (HHS/DOH)	In September, all people who qualify for Medicare will get a notice from their current plan telling them about changes to their plan for the next year.	Keep this with your plan's Evidence of Coverage (EOC). If you have questions about your plan, call the plan's customer service number.
September	CMS	Letter of Denial Status Notice (CMS Form No. 10-1080)	Inform people that they no longer qualify for Extra Help.	Apply for Extra Help through Social Security. If you are denied, you can appeal the decision.
Late September	CMS	2022 Medicare Prescription Drug Benefit (CMS Form No. 10-1080)	Inform people that they no longer qualify for Extra Help.	Keep this with your plan's Evidence of Coverage (EOC). If you have questions about your plan, call the plan's customer service number.
Early October	Employer/union plans	Notice of Creditable Coverage	Inform people that they no longer qualify for Extra Help.	Keep this with your plan's Evidence of Coverage (EOC). If you have questions about your plan, call the plan's customer service number.



### SHIBA trainers

This will be your time to talk with your groups about OEP planning. OEP training may be adapted to fit the needs of your group.

The CMS Guide to consumer mailings document may be found by doing a web search (such as Google or Bing) for “cms guide to consumer mailings” or by visiting CMS.gov and searching for the same phrase.

You may either link to the CMS.gov version of the document or use the versions on the next five slides for reference in case you are unable to access the CMS site.



## Guide to consumer mailings from CMS, Social Security, & plans in 2021/2022

(All notices available online are hyperlinked, but note that current year versions for many notices aren't posted until fall. You can also visit [Medicare.gov/forms-help-resources/mail-you-get-about-medicare](https://www.cms.gov/forms-help-resources/mail-you-get-about-medicare) to view this information.)

Mail date	Sender	Mailing/color	Main message	Consumer action
Mid-May	Social Security	Social Security LIS and MSP Outreach Notice (SSA Pub. Forms L447 & L448)	Notifies people who may be eligible for Medicare Savings Programs (MSPs) about MSPs and the Extra Help available for Medicare prescription drug coverage.	<ul style="list-style-type: none"> <li>If you think you qualify for Extra Help, you should apply.</li> <li>Apply for Extra Help through Social Security.</li> </ul>
Early September	Social Security	Social Security Notice to Review Eligibility for Extra Help (SSA Form No. 1026)	Notifies people selected for review that they should see if they continue to qualify for Extra Help. Includes an "Income and Resources Summary" sheet.	If you get this notice, you must return the enclosed form in the enclosed postage-paid envelope within 30 days or your Extra Help may end.
September	Plans	Plan Annual Notice of Change (ANOC) and Evidence of Coverage (EOC) <a href="#">Model ANOC</a>	By <b>September 30</b> , people will get a notice from their current plan outlining 2022 formulary, benefit design, and/or premium changes.	Review changes to decide whether the plan will continue to meet your needs next year.
September	Plans	Plan LIS Rider <a href="#">Model LIS Rider</a>	By <b>September 30</b> , all people who qualify for Extra Help will get an LIS rider from their plan telling them how much help they'll get next year towards their Part D premium, deductible, and copayments.	Keep this with your plan's "Evidence of Coverage" (EOC), so you can refer to it if you have questions about your costs.
September	CMS	Loss of Deemed Status Notice (Product No. 11198) (GREY Notice)	Notifies people that they no longer automatically qualify for Extra Help as of January 1, 2022.	Apply for Extra Help through Social Security (application and postage-paid envelope enclosed) or a State Medical Assistance (Medicaid) office.
Late September	CMS	<a href="#">"Medicare &amp; You" Handbook</a>	Mailed to all Medicare households each fall. Includes a summary of Medicare benefits, rights, and protections; lists of available health and drug plans; and answers to frequently asked questions about Medicare.	Keep the handbook as a reference guide. You can also download a copy online at <a href="https://www.medicare.gov">Medicare.gov</a> .
Early October	Employer/union plans	<a href="#">Notice of Creditable Coverage</a>	By <b>October 15</b> , employer/union and other group health plans must tell all Medicare-eligible enrollees whether or not their drug coverage is creditable.	Keep the notice.

As of January 2022. Available at: <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf>

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Mail date	Sender	Mailing/color	Main message	Consumer action
October	Plans	Plan Marketing Materials	On October 1, plans begin sending marketing materials for next year.	Use this information to compare options for next year.
October	Plans	Plan Non-Renewal Notice	By October 2, people whose current plan is leaving the Medicare Program next year will get notices from plans.	You must look for a new plan for coverage next year.
October	CMS	Change in Extra Help Co-payment Notice (Product No. 11129) (ORANGE Notice)	Informs people that they still automatically qualify for Extra Help, but their copayment levels will change starting January 1, 2022.	<ul style="list-style-type: none"> <li>Keep the notice.</li> <li>No action, unless you believe an error has occurred.</li> </ul>
Late October <small>*This notice won't be mailed if no poor-performing plans are identified for the upcoming plan year.</small>	CMS	Consistent Poor Performer Notice (Product No. 11627)	Informs people that they're enrolled in a plan that has been identified as a consistent poor performer (i.e. fewer than 3 stars for 3 or more consecutive years) and encourages them to explore other plan options in their area.	<ul style="list-style-type: none"> <li>Visit <a href="https://www.medicare.gov/plan-compare">Medicare.gov/plan-compare</a> to find and compare plans in your area.</li> <li>You can change plans during the Open Enrollment Period (October 15–December 7). Call 1-800-MEDICARE (1-800-633-4227) to change plans outside of this period. TTY users can call 1-877-486-2048.</li> </ul>
November	CMS	Reassignment Notice – Plan Termination (Product No. 11208) (BLUE Notice)	Informs people that their current Medicare drug plan is leaving the Medicare Program and they'll be reassigned to a new Medicare drug plan effective January 1, 2022, unless they join a new plan on their own by December 31, 2021.	<ul style="list-style-type: none"> <li>Keep the notice.</li> <li>Compare plans to see which plan meets your needs.</li> <li>Change plans, if you choose, in early December.</li> <li>For more information, call 1-800-MEDICARE, check "Medicare &amp; You," visit <a href="https://www.medicare.gov">Medicare.gov</a>, or contact the State Health Insurance Assistance Program (SHIP) for free, personalized help.</li> </ul>
		Reassignment Notice – Premium Increase (Product No. 11209) (BLUE Notice)	Informs non-chooser LIS members that because their current Medicare drug plan premium is increasing above the regional LIS premium subsidy amount, they'll be reassigned to a new Medicare drug plan effective January 1, 2022, unless they join a new plan on their own by December 31, 2021.	
		MA Reassignment Notice (Product No. 11443) (BLUE Notice)	Informs people who get Extra Help and whose current Medicare Advantage (MA) plan is leaving the Medicare Program that they'll be reassigned to a Medicare drug plan effective January 1, 2022, if they don't join a new MA or PDP plan on their own by December 31, 2021.	

As of January 2022. Available at: <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/ConsumerMailings.pdf>

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Mail date	Sender	Mailing/color	Main message	Consumer action
Early November	CMS	LIS Choosers Notice (Product No. 11267) (TAN Notice)	Notifies people who get Extra Help and chose a Medicare drug plan on their own that their plan's premium is changing, and they'll have to pay a different premium next year unless they join a new \$0 premium plan.	<ul style="list-style-type: none"> <li>Keep the notice.</li> <li>You may want to look for a new plan for coverage for next year with a premium below the regional low income subsidy benchmark. (Notice includes list of local plans with no premium liability.)</li> <li>Change plans in early December if you choose.</li> </ul>
November	Social Security	Social Security Part B & Part D Income-Related Adjustment Amount Notice	Tells higher-income consumers about income-related Part B and Part D premium adjustments. Includes the information in the December BRI notices (see below.)	Keep the notice.
November	Social Security	Social Security LIS Redetermination Decision Notice Begins	Social Security begins mailing notices letting people know whether they still qualify for Extra Help in the coming year.	<ul style="list-style-type: none"> <li>Keep the notice</li> <li>If you believe the decision is incorrect, you have the right to appeal it. The notice explains how to appeal.</li> <li>If you have questions, call Social Security at 1-800-772-1213. TTY users can call 1-800-325-0778.</li> </ul>
Late November	Social Security	Social Security LIS and MSP Outreach Notice (Form SSA-L441)	Notifies people who may be eligible for Qualified Disabled Working Individual (QDWI) about the Medicare Savings Programs and the Extra Help available for Medicare prescription drug coverage.	<ul style="list-style-type: none"> <li>If you think you qualify for Extra Help, you should apply.</li> <li>For more information about the Extra Help or if you want to apply, call Social Security.</li> </ul>
December	Social Security	Social Security Benefit Rate Change (BRI) Notice	Tells people about benefit payment changes for the coming year due to cost of living increases, variations in the premiums that are withheld, etc.	Keep the notice.

As of January 2022. Available at: <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf>

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Mail date	Sender	Mailing/color	Main message	Consumer action
November	CMS	Reassign Formulary Notice (Product No. 11475 & Product No. 11496) (BLUE Notice)	Informs people who get Extra Help and were affected by reassignment which of the Part D drugs they took in 2021 will be covered by their new 2022 Medicare drug plan.	<ul style="list-style-type: none"> <li>Consider whether this plan is right for you, or whether another plan might cover more of your drugs.</li> <li>Compare this Medicare drug plan with others in your area.</li> <li>For more information, call 1-800-MEDICARE (1-800-633-4227), check "Medicare &amp; You," visit <a href="https://www.medicare.gov">Medicare.gov</a>, or contact the SHIP for free, personalized help. TTY users can call 1-877-486-2048.</li> </ul>
Daily-ongoing	CMS	Deemed Status Notice (Product No. 11166) (PURPLE Notice beginning in Sept/Oct)	Informs people that they'll automatically get Extra Help, including people: <ol style="list-style-type: none"> <li>With Medicare and Medicaid</li> <li>Who belong to a Medicare Savings Program</li> <li>Who get Supplemental Security Income (SSI) benefits</li> </ol>	<ul style="list-style-type: none"> <li>Keep the notice.</li> <li>No need to apply to get the Extra Help.</li> <li>Compare Medicare drug plans with others to meet your needs.</li> <li>For more information, call 1-800-MEDICARE, check "Medicare &amp; You," visit <a href="https://www.medicare.gov">Medicare.gov</a>, or contact the SHIP for free, personalized help.</li> </ul>
Daily-ongoing	CMS	Auto-Enrollment - Retroactive ONLY Notice (Product No. 12053)	Sent to people who automatically qualified for Extra Help for a <b>retroactive period</b> and informs people that Medicare will reimburse any covered prescription costs they paid during the retroactive period.	People should call Medicare's Limited Income Newly Eligible Transition (NET) Program at 1-800-783-1307 to learn how they can get paid back for part of what they spent out-of-pocket for any covered prescriptions during the retroactive period, minus any copayments that apply.
Daily-ongoing	CMS	Auto-Enrollment Notice (Product No. 11154) (YELLOW Notice)	Sent to people who automatically qualify for Extra Help because they qualify for Medicare and Medicaid and currently get their benefits through Original Medicare. These people will be automatically enrolled in a drug plan unless they decline coverage or enroll in a plan themselves.	<ul style="list-style-type: none"> <li>Keep the notice.</li> <li>No need to apply to get the Extra Help.</li> <li>If you don't join a plan, Medicare will enroll you in one.</li> <li>Compare Medicare drug plans with others to meet your needs.</li> <li>For more information, call 1-800-MEDICARE (1-800-633-4227), check "Medicare &amp; You," visit <a href="https://www.medicare.gov">Medicare.gov</a>, or contact the SHIP for free, personalized help. TTY users can call 1-877-486-2048.</li> </ul>

As of January 2022. Available at: <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf>

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Mail date	Sender	Mailing/color	Main message	Consumer action
Daily-ongoing	CMS	Auto-Enrollment - Retroactive Notice (Product No. <a href="#">11429</a> ) (YELLOW Notice)	Sent to people who automatically qualify for Extra Help with a retroactive effective date because they either 1) qualify for Medicare & Medicaid or 2) get Supplemental Security Income (SSI). These people will be automatically enrolled in a drug plan unless they decline coverage or enroll in a plan themselves.	<ul style="list-style-type: none"> <li>Keep the notice.</li> <li>No need to apply to get the Extra Help.</li> <li>If you don't join a plan, Medicare will enroll you in one.</li> <li>Compare Medicare drug plans with others to meet your needs.</li> <li>For more information, call 1-800-MEDICARE, check "Medicare &amp; You," visit <a href="#">Medicare.gov</a>, or contact the SHIP for free, personalized help.</li> </ul>
Daily-ongoing	CMS	Facilitated Enrollment Notice (Product No. <a href="#">11186</a> & Product No. <a href="#">11191</a> ) (GREEN Notice)	<p>Notifies people that they'll be automatically enrolled in a drug plan unless they decline coverage or enroll in a plan themselves, including people who:</p> <ol style="list-style-type: none"> <li>1. Belong to a Medicare Savings Program</li> <li>2. Get Supplemental Security Income (SSI),</li> <li>3. Applied and qualified for Extra Help</li> </ol>	<ul style="list-style-type: none"> <li>Keep the notice.</li> <li>If you don't join a plan, Medicare will enroll you in one.</li> <li>Compare Medicare drug plans with others to meet your needs.</li> <li>For more information, call 1-800-MEDICARE, check "Medicare &amp; You," visit <a href="#">Medicare.gov</a>, or contact the SHIP for free, personalized help.</li> </ul>
Daily-ongoing	CMS	FBDE RDS Notice (Product No. <a href="#">11334</a> )	Notifies people with Medicare and Medicaid who already have qualifying creditable drug coverage through an employer or union that they automatically qualify for Extra Help, and can join a Medicare drug plan if they want to at no cost to them.	Contact your employer or union plan to learn how joining a Medicare drug plan may affect your current coverage
Daily-ongoing	Social Security	Initial IRMAA Determination Notice	Sent to people with Medicare Part B and/or Part D when Social Security determines whether any IRMAA amounts apply. Notice includes information about Social Security's determination and appeal rights.	Keep the notice.

As of January 2022. Available at: <https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf>

You have the right to get Medicare information in an accessible format, like large print, Braille, or audio. You also have the right to file a complaint if you feel you've been discriminated against. Visit [Medicare.gov/about-us/accessibility-nondiscrimination-notice](#), or call 1-800-MEDICARE (1-800-633-4227) for more information. TTY users can call 1-877-486-2048.

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## Medicare.gov document accessibility

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People on Medicare have the right to get Medicare information in an accessible format, like large print, Braille, or audio. They also have the right to file a complaint if they feel they've been discriminated against.

Visit [Medicare.gov/about-us/accessibility-nondiscriminationnotice](https://www.medicare.gov/about-us/accessibility-nondiscriminationnotice), or call 1-800-MEDICARE (1-800-633-4227) for more information. TTY users can call 1-877-486-2048.



### **SHIBA trainers**

This information is being provided as a reminder that SHIBA and our partners work in a variety of ways to provide accessible content in various formats. If there are questions, they may contact [shiba@oic.wa.gov](mailto:shiba@oic.wa.gov) or the partner, such as Medicare.gov on this slide, directly.

<https://www.medicare.gov/about-us/accessibility-nondiscrimination-notice>



## Scenarios: Apply the timeline

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1. Your client tells you he received a letter on grey paper. What do you tell him to do?
2. It's September 20th. Your client asks what plans will be available for 2022 in their area. You don't have them yet. What do you tell them?
3. Your client is thinking about trying a Medicare Advantage plan for 2022. She asks you, "What can I do if I don't like it in 2022?"



### **SHIBA trainers**

For this activity, volunteers may refer to the **Guide to consumer mailings from CMS, Social Security, & plans in 2020/2021.**

You may do this as a group activity or in breakouts.

### **Answers to scenarios:**

1. The Grey notice says a person needs to apply for Extra Help if they want to continue for next year. Make sure they apply if there is any chance that they are eligible.
2. Medicare releases the list of plans by late September. We will have plan lists ready as soon as we can, but we want to make sure they are accurate. We will share them as soon as we can. Medicare generally posts them on the Plan Finder on October 1. No one can make an enrollment change until October 15 at the earliest.

3. Tell them about Medicare Advantage OEP. See page 2 of the 2021-2022 Medicare OEP Timeline document.

## PEBB: SHIBA's role

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### SHIBA's role with PEBB and other retirement OEP questions

- Many retiree plans have Open Enrollment in the fall. It is not within SHIBA's scope to counsel extensively about these plan options. Refer clients to:
  - Their former employer or
  - PEBB 1-800-200-1004
- The exception to the above is that SHIBA counselors may help PEBB clients compare Part D options if the client is planning to go with the PEBB Medigap.



### **SHIBA trainers**

We've had discussions about providing further assistance to PEBB clients during Open Enrollment but are not ready to change anything for this fall. There could be bad outcomes if SHIBA volunteers provide information or assistance that causes a PEBB enrollee to lose an opportunity to enroll or to complete PEBB forms improperly.

Both the Health Care Authority and the Department of Retirement Services provide information about health coverage for retirees.

There are slides in the presentation with several resources to direct SHIBA clients to, including webinars and videos a handbook and tutorials on completing forms. **Please rely on these resources to help our clients *unless* you are focusing on the Plan Finder for people selecting the Medigap option.**

## PEBB: SHIBA job aid and SHIBA's scope

---

### Job aid

#### SHIBA and PEBB: Counseling roles

- See the job aid on the next two slides and at <https://www.insurance.wa.gov/sites/default/files/documents/shiba-pebb.pdf>
- Do not help clients with filling out forms. It is outside your scope of work as a SHIBA counselor. See the SHIBA volunteer handbook pages 36-37 or speak with your RTC for a refresher on SHIBA scope. <https://www.insurance.wa.gov/media/1548>



### SHIBA trainers

Review the SHIBA job aid and SHIBA's scope and expectations regarding working with clients who have questions about PEBB.

The SHIBA job aid SHIBA and PEBB: Counseling roles may be found by doing a search on My SHIBA for "SHIBA and PEBB counseling roles."

You may either link to the SHIBA version of the document or use the versions on the next two slides for reference in case you are unable to access the My SHIBA site.

### SHIBA and PEBB: Counseling roles

The PEBB (Public Employees Benefits Board) in Washington state offers health care benefits to many active and retired public employees. The Washington State Health Care Authority manages eligibility, enrollment and plan changes. See: <https://www.hca.wa.gov/employee-retiree-benefits>

#### Ways SHIBA can assist PEBB retirees on Medicare

Potential enrollees often contact SHIBA for help with Medicare questions and may ask about choosing and enrolling in PEBB plans. SHIBA counselors are not trained to provide detailed assistance with choosing PEBB plans, but there is some very helpful information at: [www.hca.wa.gov](http://www.hca.wa.gov). Type "Retiree Enrollment Guide" in the search tool. You can share this guide with clients.

#### When PEBB members should contact SHIBA

Clients should contact SHIBA at 1-800-562-6900, Monday through Friday, 8 am to 5 pm if they need help with the following questions:

- How and when should I enroll in Medicare?
- What does Medicare cost and cover?
- I'm choosing the PEBB retiree Premiera Medicare Supplement plan that does not include prescription drug coverage. Can you help me choose a Part D prescription drug plan?
- I already have a Part D prescription drug plan and it's Open Enrollment. Can you help me compare drug plan options for the next year? (Medicare Annual Open Enrollment runs Oct. 15 through Dec. 7 each year.)
- I have limited income. Am I eligible for any help with my Medicare costs?

#### When clients should contact PEBB Benefits Services

Clients who are PEBB members can contact PEBB Benefits Services at 1-800-200-1004, Monday through Friday, 8 am to 4:30 pm or send a secure online message via <https://www.fuzeqna.com/pebb/consumer/question.asp> for help with the following services:

*Continued on back*



Page 1 of 2

See the job at  
<https://www.insurance.wa.gov/sites/default/files/documents/shiba-pebb.pdf>.

## SHIBA trainers

See SHIBA Job Aid:

<https://www.insurance.wa.gov/sites/default/files/documents/shiba-pebb.pdf>

**SHIBA and PEBB: Counseling roles job aid**

- Enroll or change plans in the Annual Open Enrollment Period (Nov. 1 through Nov. 30 each year) or in a Special Open Enrollment (for example, new to Medicare, moved to another area, change in eligibility)
- Compare and contrast medical coverage options
- Provide information about dental coverage
- Add or drop dependents
- Defer retiree coverage
- Make a change to a name, phone number, etc.
- Help with eligibility or eligibility changes (like divorce, or becoming eligible for Medicare)
- Eligibility complaints or appeals
- Forms
- Payroll deductions or premium payments

After clients enroll in a PEBB medical coverage plan, they should contact their plan directly for questions about their coverage, benefits or costs. The phone number is listed on their plan ID card, or go to: <https://www.hca.wa.gov/employee-retiree-benefits>.

Page 2 of 2

See the job at  
<https://www.insurance.wa.gov/sites/default/files/documents/shiba-pebb.pdf>.



## **SHIBA trainers**

See SHIBA Job Aid:

<https://www.insurance.wa.gov/sites/default/files/documents/shiba-pebb.pdf>

## PEBB: Discussion activity

Your trainer may lead an activity to discuss working with clients who have questions about PEBB.

- Public Employees Benefits Board  
<https://www.hca.wa.gov/about-hca/public-employees-benefits-board-pebb-program>
- See the notes section of this slide for the discussion activity.
- The next slide provides referral resources.
- See the SHIBA job aid **SHIBA and PEBB: Counseling roles** which provides info on what you can do.  
<https://www.insurance.wa.gov/sites/default/files/document/s/shiba-pebb.pdf>



### SHIBA trainers

This is an optional activity to discuss working with clients who have questions about PEBB.

PEBB Open Enrollment is November 1 to November 30.

Discussion: What can you tell a client about SHIBA's assistance for a person who has PEBB retiree benefits?

Some suggestions:

- If they have the Premiera Medigap Plan F or G, they should compare Part D plans yearly, just like any other Medicare beneficiary. SHIBA can help with this.
- HCA posts lots of information about options on their web site:  
<https://www.hca.wa.gov/employee-retiree-benefits/retirees>

Two helpful documents:

- The "For Your Benefit" PEBB newsletter-Retiree Edition. Sent to all retirees. The October edition will cover OEP options.
- The PEBB Retiree Enrollment Guide. The 2022 edition should be available in October 2021.

Questions:

- Clients can try to get their questions answered on the PEBB web site first but may need to call the PEBB- 800-200-1004 to verify. We are sorry, but we know of no way to get them to answer any more quickly. Suggest calling early and not waiting until late November.
- If clients have specific questions about the PEBB health plans, they should call the plans directly. The numbers are on the PEBB web site.



# PEBB: Resources

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## PEBB Retiree Health Coverage Resources

### Health Care Authority

- <https://www.hca.wa.gov/employee-retiree-benefits/contact-us>
- 1-800-200-1004
- Send a **secure message**:  
<https://www.fuzeqna.com/pebb/consumer/question.asp>

### Department of Retirement Systems

- <https://www.drs.wa.gov/>
- 360-664-7000
- **Toll-free:** 1-800-547-6657
- **Webinars** and videos:  
<https://www.drs.wa.gov/retirement-planning/seminar/>

Scroll down the page to view "**Health Care in Retirement**" video.



## PEBB: Resources (*cont'd*)

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### PEBB Retiree Health Coverage Resources

#### HCA page with links to information about retiree health insurance:

- <https://www.hca.wa.gov/employee-retiree-benefits/retirees>
- PEBB Retiree **Enrollment Guide**:  
<https://www.hca.wa.gov/assets/pebb/51-0205-retiree-enrollment-guide-2021.pdf>
- Monthly retirement **seminars** including overview of retiree health insurance:  
<https://www.hca.wa.gov/employee-retiree-benefits/retirees/attend-retirement-webinar>



## Plan Finder



## Plan Finder: Webinar updates

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### **As of August 20, 2021:**

CMS NTP held a Train-the-Trainer workshop on 8/19/21 which has a great overview.

- The training slides are available now on My SHIBA and CMS.
  - <https://www.insurance.wa.gov/media/10229> (PowerPoint)
  - See the next slide for a webinar summary.
- The recorded webinar should be posted on CMS.
- Visit <https://cmsnationaltrainingprogram.cms.gov/> for more information.
  - Search for "Medicare plan finder."
  - Look through the search results for "Workshop: Medicare Plan Finder (Recorded August 19, 2021)."



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*Continued*  
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### **SHIBA trainers**

At the time of developing these materials in August 2021, the links from this slide were posted on the CMS NTP website, however, the link to the recording was not active.

## Plan Finder: Webinar updates (*cont'd*)

### Webinar Summary

- If people log into their Medicare accounts to use Plan Finder, it will automatically save their preferred pharmacy in addition to their prescription drugs.
- The Insulin Savings filter has been removed (as of 8/19). You'll now just search for the lowest premium + drug costs filter for best priced plans.
- Plan comparison: comparing 3 plans has been improved for mobile users and format for printing results has been improved.
- Out-of-network/preferred pharmacies: you will have to click on plan details to find out which pharmacies are out-of-network or preferred. When you click on a plan's details, it will list all in-network and preferred pharmacies for those plans.
- CMS is working on developing a "SHIP specific view" of Plan Finder which will allow SHIP/SHIBA volunteer to access a client's Medicare account using the client's Medicare number (instead of using the client's Medicare account login). CMS is developing a login for SHIP/SHIBA volunteers; stay tuned for more info.

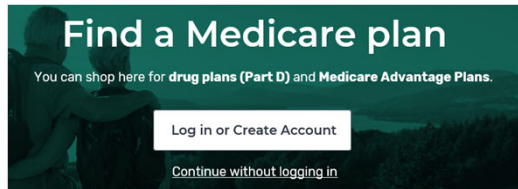


### **SHIBA trainers**

- This slide provides an overview of highlights from the 8/19/21 CMS NTP Webinar
- Thanks to Sarah Clark for providing some notes.
- Some enhancements won't happen until sometime in September 2021, and in the case of the SHIP-specific view, that will be launched later.

## Group activity: Plan Finder review

Your trainer may present one of the following Plan Finder activities:



1. Present and demonstrate using Plan Finder.

[www.medicare.gov/plan-compare/#/?lang=en](https://www.medicare.gov/plan-compare/#/?lang=en)

2. Watch the YouTube demo (about 15 minutes)

<https://www.youtube.com/watch?app=desktop&v=QgXmY8-gEHk>

3. Review of August 19, 2021 NTP training materials



### **SHIBA trainers**

Optional: Discuss as a group or use the Zoom breakout room option to discuss in smaller groups.

Regarding #2 about the YouTube demo, the presenter at the NTP Train-the-Trainer webinar on 8/19 said that CMS may update this video to show the updated system. No ETA has been announced.

Mechanics of Plan Finder: Using, playing with it, practice, and how to maximize your time on Plan Finder.

- Mechanics of Plan Finder
- Practicing Plan Finder.
- Perhaps develop a Zoom recording.

## Optional practice sessions: Communicating with clients to complete enrollment



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### **SHIBA trainers**

This section is optional. Plan Finder work sheets that you can use for practice are located on My SHIBA with the curriculum materials for September 2021 training.

# Job aid: OE counseling checklist

## Checklist for SHIBA open enrollment counseling

Your trainer may lead you in an optional activity.

- Two pages
- <https://www.insurance.wa.gov/media/1542>
- A larger version is on the next two slides.
- The full-sized version is located on [My SHIBA](#).

The thumbnail shows the 'Checklist for SHIBA Open Enrollment counseling' job aid. It includes sections for 'To help your clients prepare for an Open Enrollment counseling session, ask them:' and 'During your meeting:'. The 'To help your clients prepare...' section lists tasks like collecting Medicare and plan cards, checking for a personalized account on Medicare.gov, and obtaining a print-out from the pharmacy or completing a SHIBA Plan Finder Worksheet. The 'During your meeting:' section lists tasks like listening to questions, screening every client for MSP and LIS, reviewing letters, discussing MA-PD vs. PDP, running Plan Finder comparisons, and highlighting costs. It also includes contact information for SHIBA and a note to continue on the next page.



### SHIBA trainers

The Checklist for SHIBA Open Enrollment counseling is a job aid to help volunteers with getting their clients prepared for a structured counseling session.

**Activity suggestion:** Discuss how your group might use and share these OEP publications with clients.

- How to set up a personalized Plan Finder account:  
<https://www.insurance.wa.gov/sites/default/files/documents/plan-finder-account-creation.pdf>
- SHIBA Plan Finder Worksheet:  
<https://www.insurance.wa.gov/sites/default/files/documents/medicare-planfinder-worksheet.pdf>
- Your SHIBA Medicare Action Plan:



[https://www.insurance.wa.gov/sites/default/files/documents/shiba-medicare-action-plan\\_0.pdf](https://www.insurance.wa.gov/sites/default/files/documents/shiba-medicare-action-plan_0.pdf)

The Open Enrollment counseling checklist may be found by doing a search on My SHIBA for "Open Enrollment counseling checklist."

You may either link to the SHIBA version of the document or use the versions on the next two slides for reference in case you are unable to access the My SHIBA site.

#### 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 plan, Social Security, DSHS, etc. (including 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 questions and concerns of the client. Be sure to learn 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 MSP and LIS and refer for application assistance if appropriate.
- ☐ Review letters and any pertinent mail.
- ☐ Discuss MA-PD vs. PDP, if applicable.
- ☐ Run Plan Finder comparison, give or e-mail results to client. Point out or highlight costs, drug coverage, usage restrictions, etc., if appropriate.
- ☐ Check to see if they have any other questions.

*Continued on next page*



## **SHIBA trainers**

The Checklist for SHIBA Open Enrollment counseling is a job aid to help volunteers with getting their clients prepared for a structured counseling session.

**Activity suggestion:** Discuss how your group might use and share these OEP publications with clients.

- How to set up a personalized Plan Finder account:  
<https://www.insurance.wa.gov/sites/default/files/documents/plan-finder-account-creation.pdf>
- SHIBA Plan Finder Worksheet:  
<https://www.insurance.wa.gov/sites/default/files/documents/medicare-planfinder-worksheet.pdf>
- Your SHIBA Medicare Action Plan:

[https://www.insurance.wa.gov/sites/default/files/documents/shiba-medicare-action-plan\\_0.pdf](https://www.insurance.wa.gov/sites/default/files/documents/shiba-medicare-action-plan_0.pdf)

**Checklist for SHIBA Open Enrollment counseling**

- ☐ 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](#).



## Practice: Plan Finder scenarios

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Your trainer may lead a discussion based on three Plan Finder Practice scenarios.

- See the scenarios and discussion instructions on the next slide.
- Questions to consider are located in the notes portion of the slide.
- The scenario worksheets are also located on [My SHIBA](#) with the September 2021 continuing education materials.

**Reference:** Medicare Plan Finder worksheet  
<https://www.insurance.wa.gov/media/8042>

*Continued*



### **SHIBA trainers**

This is an optional discussion with three training scenarios.

- See the slide that goes with these notes for more information.
- Training scenarios are also posted on MySHIBA.
- Use the Medicare Plan Finder worksheet as reference for discussion and work on these scenarios.
- Questions to consider are in the notes on the next slide as well as on the PDFs posted on My SHIBA.

## Practice: Plan Finder scenarios (*cont'd*)

1. Shelley wants to compare Part D plans to see if she should change for 2022.
2. Carlos wants to save as much money as he can. You have screened him, and he might be eligible for Extra Help. Can you find the possible costs with and without Extra Help?
3. Jin is interested in drug coverage and additional benefits in a Medicare Advantage plan in your county (if applicable).



### **SHIBA trainers**

Notes: Please see the three Plan Finder practice scenario sheets with lists of drugs for Shelley, Carlos and Jin located on My SHIBA with the September 2021 continuing education curriculum documents.

**Reference:** Medicare Plan Finder worksheet

<https://www.insurance.wa.gov/sites/default/files/documents/medicare-planfinder-worksheet.pdf>

### **Questions to consider:**

- What do you do if the Plan Finder shows a Generic version of the drug?
- What do you do if you can't find the drug on the Plan Finder?
- What if you know (or learn) the drug is over-the-counter?
- What do you do if you know (or learn) the drug is covered by Medicare Part B?

- What do you do if the Plan Finder tells you there is Prior Authorization, Quantity Limits or Step Therapy for a certain drug?
- If your county has Medicare Advantage plans, how do you show your client the costs for medical care? How do you show your client how to understand the additional benefits the plan may offer?

## Practice: Sharing Plan Finder results

---

Your trainer can demonstrate ways to save and share Plan Finder results.

**Activity:** See the next two slides for information on how to save Plan Finder results and send as an email or attach to a STARS beneficiary contact (BC).

### Questions:

- What information do you share with a client?
- How do you explain the results to a client?

*Continued*



### **SHIBA trainers**

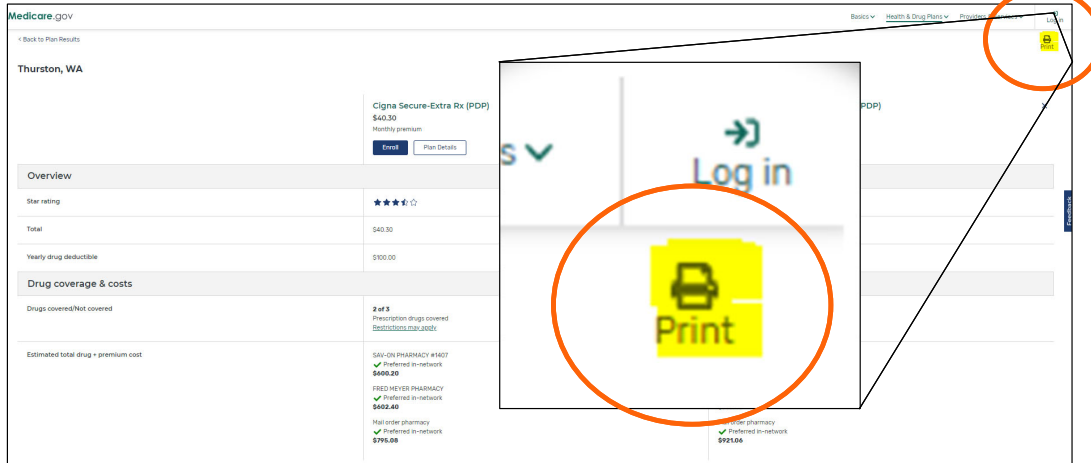
Demonstrate saving Plan Finder results.



## Practice: Sharing Plan Finder results (cont'd)

1. From a Plan Finder results webpage, click the **PRINT** icon in the upper right of the webpage. See the example below, which is circled on the right and then enlarged.

<https://www.medicare.gov/plan-compare>



### **SHIBA trainers**

You may access Medicare.gov to demonstrate a plan compare which may give a better view of these slide examples.

## Practice: Sharing Plan Finder results (cont'd)

2. Select: Save as PDF.
3. Click: Save.

Medicare.gov

Thurston, WA

Cigna Secure-Extra Rx (PDP)  
Monthly premium: \$40.30  
Star rating: 4.5 stars

Express Scripts Medicare - Choice (PDP)  
Monthly premium: \$71.60  
Star rating: 4.5 stars

Overview

Star rating: 4.5 stars

Total: \$40.30

Yearly drug deductible: \$100.00

Drug coverage & costs

Prescription drugs covered: 3 of 3

Estimated total drug + premium cost: \$40.30

Print

Destination: **Save as PDF**

Pages: All

Layout: Portrait

More settings

Paper size: Letter

Pages per sheet: 1

Margins: Default

Scale: Custom (6.1)

Options: ☐ Background graphics

Save Cancel



## Practice: Sharing Plan Finder results (*cont'd*)

---

### 4. Save and send the PDF

Decide where to save it

- Desktop is a good option
- Your computer may work differently
- Name the file in a way you can identify it
- Example: **PF Results J Smith 10-20-21**

### 5. Decide how to send it

- Attach to an email
- Print and mail

**Group question:** Are there other ways to share this info?



## Practice: Communicating results

---

Activity: Your trainer may lead an activity in breakouts or as a group.

Share how you would counsel a client to explain the following Plan Finder results:

- Estimated annual costs.
- Are all drugs on the formulary?
- Any restrictions?
- Costs at different pharmacy or “preferred” pharmacies.

*Continued*



### **SHIBA trainers**

Practice Sessions: Lead an activity to help volunteers in communicating Plan Finder results and next steps with a client.

#### **Additional resource from CMS:**

**<https://www.medicare.gov/Pubs/pdf/11163-Compare-Medicare-Drug-Coverage.pdf>**

Effectively communicating with clients to complete enrollment

- Items to cover include:
  - Here is your confirmation number, keep it, it's important.
  - You should receive a welcome packet. It should be in about 10 days.
  - Look in the mail for things from your plan. Might look like junk but there will be info like formulary, websites, info, member id...don't throw this stuff away. It might be needed in the future.

## Practice: Communicating results (*cont'd*)

---

Activity: Share how you would counsel a client to explain the following Plan Finder results:

- Costs and Maximum Out-of-Pocket for a Medicare Advantage plan if applicable.
- Next steps clients can take.
  - Call plan for more information.
  - Enroll in plan.



### **SHIBA trainers**

Practice Sessions: Lead an activity to help volunteers in communicating Plan Finder results and next steps with a client.

Effectively communicating with clients to complete enrollment

- Items to cover include:
  - Here is your confirmation number, keep it, it's important.
  - You should receive a welcome packet. It should be in about 10 days.
  - Look in the mail for things from your plan. Might look like junk but there will be info like formulary, websites, info, member id...don't throw this stuff away. It might be needed in the future.

## Practice: Sharing Plan Finder results

---

The most efficient way to share Plan Finder results is by using email.

**Discuss** other ways to share results:

- When meeting with a client in-person.
- By U.S. mail.



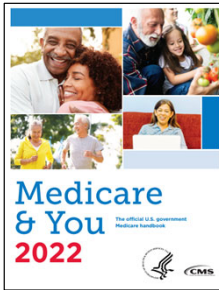
### **SHIBA trainers**

Lead a discussion on other ways to share Plan Finder results with a client.

## Resources to support you during OEP



# September 2021 resources



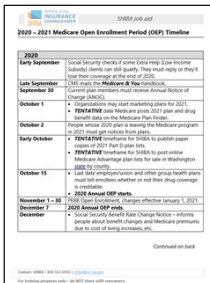
## Medicare & You 2021 and 2022

Partner publication

[www.medicare.gov/Pubs/pdf/10050-medicare-and-you.pdf](http://www.medicare.gov/Pubs/pdf/10050-medicare-and-you.pdf)

Audio file and podcast information for ordering:

<https://downloads.cms.gov/media/medicare/pub/01-Welcome-to-Medicare-and-You-2021.mp3>



## 2021-2022 Medicare Open Enrollment Period (OEP) timeline

SHIBA job aid

<https://www.insurance.wa.gov/media/6901>

2 pages

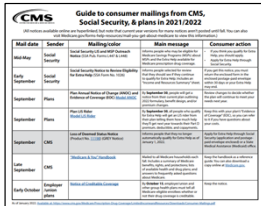


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# September 2021 resources



## CMS Guide to consumer mailings

Partner publication

[www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf](https://www.cms.gov/Medicare/Prescription-Drug-Coverage/LimitedIncomeandResources/Downloads/Consumer-Mailings.pdf)

Five pages



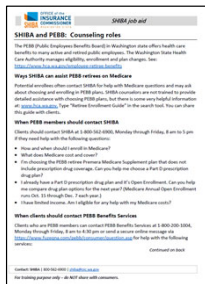
## Things to think about when you compare Medicare drug coverage

<https://www.medicare.gov/Pubs/pdf/11163-Compare-Medicare-Drug-Coverage.pdf>

Eight pages



# September 2021 resources

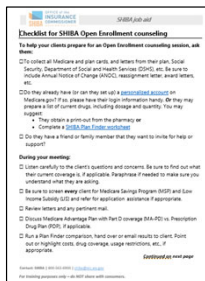


## SHIBA and PEBB: Counseling roles

### SHIBA job aid

<https://www.insurance.wa.gov/media/6116>

Two pages



## Checklist for Open Enrollment counseling

<https://www.insurance.wa.gov/media/1542>

Two pages



# September 2021 resources



**Medicare Plan Finder worksheet**

**NOTE:** Medicare Open Enrollment starts October 15 - December 7 for coverage to take effect on January 1.

Call your local Statewide Health Insurance Benefits Advisors (SHIBA) program.

Our volunteers provide one-on-one counseling and will research options and share them with you so you can make an informed decision. SHIBA is a free, confidential and confidential service of the Washington State Office of the Insurance Commissioner.

Call us for appointments, by phone, email, through an online meeting platform, text or Zoom, or in-person (restrictions apply). We also have language assistance available.

Planfinder for local plans only.

If you want SHIBA help, please email or fax the completed worksheet to:

Planfinder for local plans only.

Plan ahead! Don't wait until the last minute to make your choice. Medicare's annual Open Enrollment Period ends December 7. Some people have different deadlines. If you're not sure, please ask SHIBA.

## Medicare Plan Finder worksheet

SHIBA client publication

Search My SHIBA for "planfinder worksheet"

[www.insurance.wa.gov/media/8042](http://www.insurance.wa.gov/media/8042)

Four pages



**Your SHIBA Medicare action plan**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Thank you for attending a SHIBA (Statewide Health Insurance Benefits Advisors) appointment. We offer free, confidential and unbiased help to understand and compare health care coverage and Medicare. Please keep this action plan for your records.

The notes that are marked are for you:

☐ This is the information needed to follow up my Plan Finder results:

- ☐ Plan name \_\_\_\_\_
- ☐ Enrollment date \_\_\_\_\_

☐ I need more information about my plan choices before I enroll. I will call and ask about:

☐ I have chosen to enroll in the following plan:

☐ Wellpoint/My \_\_\_\_\_

- ☐ Calling SHIBA (800) 455-4544
- ☐ Calling the plan directly at \_\_\_\_\_
- ☐ Other \_\_\_\_\_

☐ Date enrollment was completed: \_\_\_\_\_

☐ Other address(es) I will take: \_\_\_\_\_

**Notes:**

Plan enrollment by December 15 your new plan will take effect January 1.

When you complete your enrollment, the plan should send you an enrollment confirmation or about how soon. Call your plan if you have no response. Write down your plan's customer service phone number.

If you have any other questions, call SHIBA at 1-800-552-4544 or locally at \_\_\_\_\_.

SHIBA (Statewide Health Insurance Benefits Advisors) is a service of the Washington State Office of the Insurance Commissioner.

## Your SHIBA Medicare action plan (SHP 855)

SHIBA client publication

<https://www.insurance.wa.gov/media/1541>

One page



# September 2021 resources

A Medicare plan comparison form (SHP838) with three columns for Plan 1, Plan 2, and Plan 3. It includes sections for Plan characteristics, Out-of-pocket costs, and Other plan features. The form is designed to help beneficiaries compare different Medicare plans.

## Medicare plan comparison form (SHP838)

SHIBA client publication

[www.insurance.wa.gov/sites/default/files/documents/medicare-plan-comparison-form-2.pdf](http://www.insurance.wa.gov/sites/default/files/documents/medicare-plan-comparison-form-2.pdf)

Two pages

A document titled "Medicare Minute Teaching Materials Common Open Enrollment Notices" for August 2021. It includes logos for Medicare Rights, SHIBA, and the Washington State Department of Social & Health Services. The document contains text about the Medicare Open Enrollment Period and provides instructions for beneficiaries.

## Medicare Minute Teaching Materials Common Open Enrollment Notices

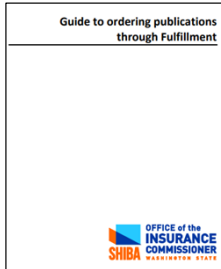
August 2021

<https://www.insurance.wa.gov/sites/default/files/documents/common-open-enrollment-notices.pdf>



## September 2021 resources

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### **Guide to ordering publications through Fulfillment**

Step-by-step instructions for ordering publications and have them directly mailed to you or a client.

SHIBA client publication

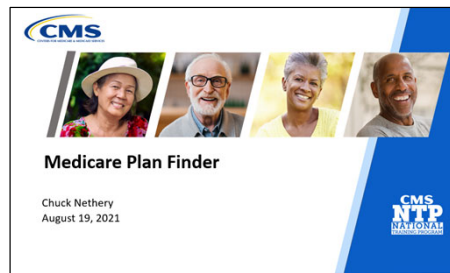
<https://www.insurance.wa.gov/sites/default/files/documents/order-publications-guide.pdf>

Ten pages



# September 2021 resources

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## **CMS NTP Virtual Workshop: Medicare Plan Finder**

- Webinar from August 19, 2021
- <https://www.insurance.wa.gov/media/10229> (PowerPoint) or
- <https://cmsnationaltrainingprogram.cms.gov/moodle/course/view.php?id=147> (login may be required)
- Log into <https://cmsnationaltrainingprogram.cms.gov> and search for "CMS NTP Virtual Workshop: Medicare Plan Finder."



## SHIP TA: Webinars and materials

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SHIP TA offers many training sessions and webinars along with providing a library of training materials.

Here is one offering for September:

### **Using Your CMS Unique ID Webinar**

Wednesday, September 22, 2021 | 2:30 pm - 4:00 pm ET  
SHIP National Technical Assistance Center (SHIP TA Center)  
[info@shiptacenter.org](mailto:info@shiptacenter.org) | 1-877-839-2675 | [www.shiptacenter.org](http://www.shiptacenter.org)



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**Webinar description:** The Centers for Medicare & Medicaid Services (CMS) Unique ID system is available to State Health Insurance Assistance Programs (SHIPs) and Senior Medicare Patrol (SMP) programs through a collaboration between the Administration for Community Living (ACL) and CMS. The system is designed to remove barriers to researching beneficiaries' complex Medicare issues.

CMS Unique IDs are used by active, approved, screened, and trained SHIP and SMP team members to contact Medicare, participating Medicare plans, and the Benefits Coordination & Recovery Center (BCRC) for CMS. They serve as a form of verification to provide access to certain beneficiary information when assisting Medicare beneficiaries.

This webinar will provide training for SHIP and SMP representatives with CMS Unique IDs about how to use their IDs.

Speakers:

- Maggie Flowers, Administration for Community Living

- Marissa Whitehouse, Administration for Community Living
- Ginny Paulson, SHIP Technical Assistance Center
- Heather Flory, SMP Resource Center

Audience: This webinar is intended for SMP and SHIP team members who need to know how to use their CMS Unique IDs. This includes SHIP counselors who have been assigned a CMS Unique ID.



## CE topics and evaluation



# 2021-2022 training schedule

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## **2021**

October: Are we ready?

- No NEW training topics for October.
- Bring and share late-breaking information.
- What still must be done in our area to get ready?
- Reviewing gaps and questions.
- Support and case-sharing.

November and December: No training--it's Open Enrollment!

## **2022**

January: Happy new year!

- Continuing Ed topics to be announced.



## Evaluation

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Your responses help us to improve SHIBA's training program.

- ☐ *Did you find today's training helpful or useful for your SHIBA counseling or outreach?*
- ☐ *What would have made this training better for you?*

Please take some time to send thoughts to [shiba@oic.wa.gov](mailto:shiba@oic.wa.gov), [dianas@oic.wa.gov](mailto:dianas@oic.wa.gov) or to your trainer.

We appreciate your feedback!

