



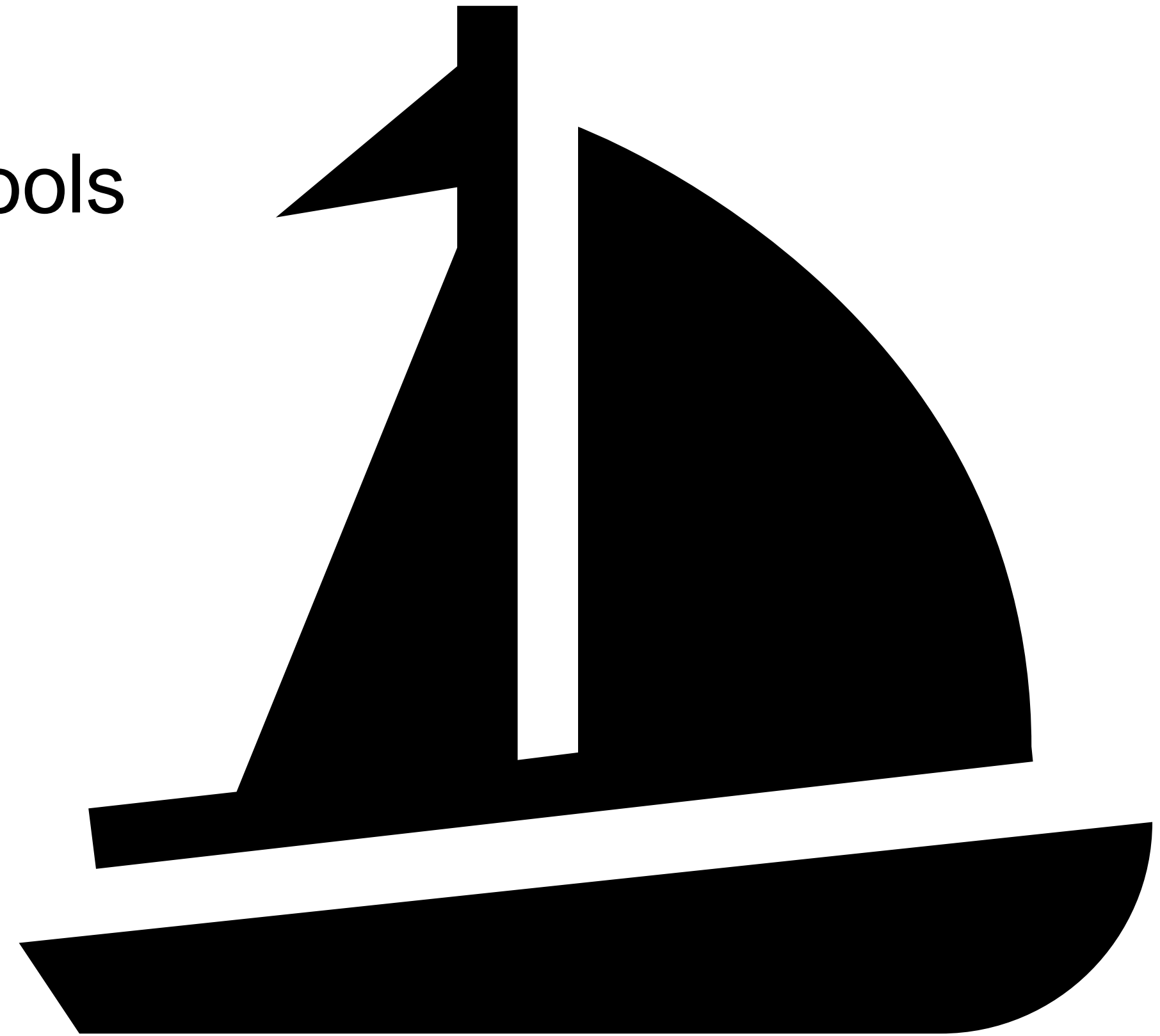
# **SHIPtools – 2021 Medicare Open Enrollment Tips and Tools For Volunteers**

**10.5.2021**



# What you will learn:

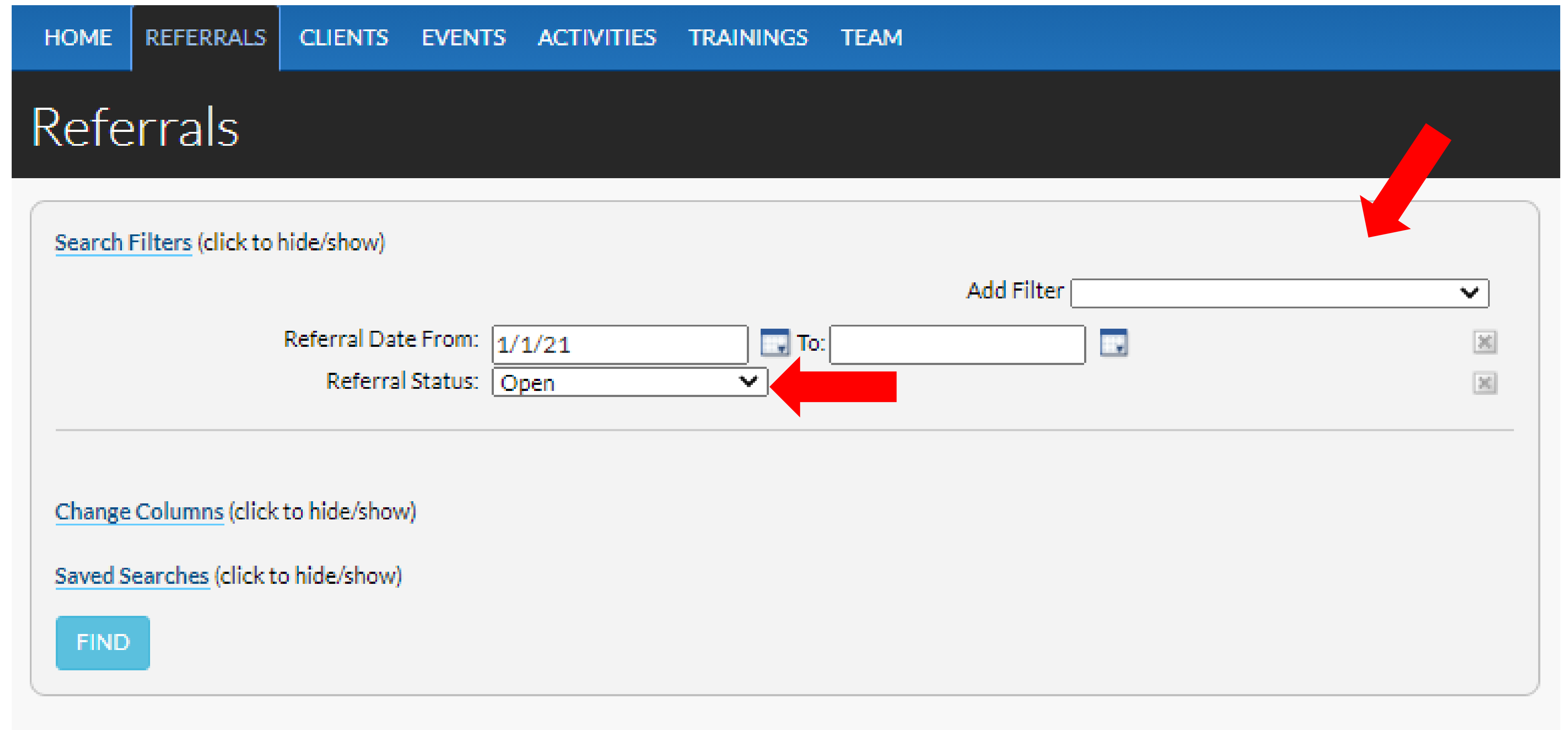
- Review Filter & Sorting Features in SHIPtools
- Entering PDP & MA Costs Savings
- Helpful Hints
- Q&A



# All Tabs

1) Filters are your Friends!

Use the Filter feature to find the data you need or.....



The screenshot shows a navigation bar with tabs: HOME, REFERRALS (selected), CLIENTS, EVENTS, ACTIVITIES, TRAININGS, and TEAM. Below the navigation bar is a dark header with the word "Referrals" in white. The main content area is a light gray box containing filter options. At the top left of this box is a link "Search Filters (click to hide/show)". To the right is an "Add Filter" dropdown menu. Below these are two filter rows. The first row is "Referral Date From: 1/1/21" with a calendar icon and "To:" with an empty date field and a calendar icon. The second row is "Referral Status: Open" with a dropdown arrow. A red arrow points to the "Add Filter" dropdown, and another red arrow points to the "Referral Status" dropdown. Below the filter rows are three more links: "Change Columns (click to hide/show)", "Saved Searches (click to hide/show)", and a blue "FIND" button.

# All Tabs

## Delete a Filter to see more!

HOME REFERRALS CLIENTS EVENTS ACTIVITIES TRAININGS TEAM

Clients [Show Client Notes](#)

[Search Filters](#) (click to hide/show)

Add Filter

Counselor:

Show incomplete CCFs:

[Change Columns](#) (click to hide/show)

[Saved Searches](#) (click to hide/show)

**DEFAULT**

Client Name	Contact Date	Counselor	Approved	Export Status
<a href="#">Cardwell, Martha</a>	Sep 30, 2021	Rackers, Anthony	Approved	pending
<a href="#">Gipson, Nellie</a>	Sep 21, 2021	Rackers, Anthony	Approved	pending
<a href="#">Mahood, Karla</a>	Sep 16, 2021	Rackers, Anthony	Approved	pending
<a href="#">Riegel, John</a>	Sep 24, 2021	Rackers, Anthony	Approved	pending
<a href="#">Thessen, William</a>	Sep 22, 2021	Rackers, Anthony	Approved	pending

HOME REFERRALS CLIENTS EVENTS ACTIVITIES TRAININGS TEAM

Clients [Show Client Notes](#)

[Search Filters](#) (click to hide/show)

Add Filter

Contact Date From:   To:

Show incomplete CCFs:

[Change Columns](#) (click to hide/show)

[Saved Searches](#) (click to hide/show)

Client Name	Contact Date	Counselor	Approved	Export Status
<a href="#">Cardwell, Martha</a>	Sep 30, 2021	Rackers, Anthony	Approved	pending
<a href="#">Gipson, Nellie</a>	Sep 21, 2021	Rackers, Anthony	Approved	pending
<a href="#">Luetkemeyer, Joanie</a>	Sep 20, 2021	Utterback, Sue	Approved	pending
<a href="#">Mahood, Karla</a>	Sep 16, 2021	Rackers, Anthony	Approved	pending
<a href="#">Mcdaniel, James</a>	Sep 25, 2021	Utterback, Sue	Approved	pending
<a href="#">McDaniel, James</a>	Sep 21, 2021	Utterback, Sue	Approved	pending
<a href="#">Riegel, John</a>	Sep 24, 2021	Rackers, Anthony	Approved	pending
<a href="#">Thessen, William</a>	Sep 22, 2021	Rackers, Anthony	Approved	pending

You can enter another Client Contact that your co-worker helped before

# All Tabs –

## Sort all detail columns by clicking on them

Search Filters (click to hide/show)

Add Filter

Referral Date From:  To:

Referral Status:

Change Columns (click to hide/show)

Saved Searches (click to hide/show)

**FIND**

DEFAULT

**ADD REFERRAL**

Referral Date	Client Name	Handled By	Assigned Partner	Assigned Volunteer	Call Time	Referral Status	Referral Notes
10/4/2021	<a href="#">Rita Powers</a>	Michael Mosley	CLAIM\Columbia		Anytime	Open	Audrain County - Would like to review her Extra Help due to her income increase - MRM
10/4/2021	<a href="#">Alonzo Ralph</a>	Michael Mosley	St. Louis Area Agency on Aging		Anytime	Open	Saint Louis City - Disabled - Would like to review his enrollment in the Part D Plan - MRM
10/4/2021	<a href="#">Mary Ann DeSantis</a>	Michael Mosley	Barnes Jewish West County Hospital		Anytime	Open	Saint Louis County - Would like to review her Party D Plan due to an increase in coast of her Plan - MRM

Search Filters (click to hide/show)

Add Filter

Referral Date From:  To:

Referral Status:

Change Columns (click to hide/show)

Saved Searches (click to hide/show)

**FIND**

**ADD REFERRAL**

Referral Date	Client Name	Handled By	Assigned Partner	Assigned Volunteer	Call Time	Referral Status	Referral Notes
9/27/2021	<a href="#">Nina Morrow</a>	Marcia Waters	Aging Ahead - St. Peters Senior Center	Peggy Illert	Anytime	Open	10-01-2021- Client called today to make sure she did not miss your call -- MW Saint Charles County - Client Has more questions about Medicare -- MW
9/27/2021	<a href="#">Fred Fender</a>	Sandra Levels	The Whole Person	Sandra Levels	AM	Open	Jackson County -- Humana Medicare PTO currently would like someone to explain Medicare Plans to go with his policy He will not be available on Tuesday morning -- MW 9/30/21@12:09 called; no answer; left message & # for him to return

Please remember to do the oldest Referrals first!

# Important Information on Client Contacts!!!

When you enter an amount in the **Savings** Box on the contact form for a **Part D or MA Plan**, it must be accompanied with the backup. **(If client is new to Medicare, do not put in costs savings!)**

- 1) Save the Plan Finder Documents and Enrollment confirmation in a secure file, thumb drive or computer.
- 2) Put in the date of Current Plan and New Plan
- 3) Click on Choose File button to attach the files.
- 4) When you put in the cost of old/new plan, the system will figure the savings for you.

**If the backup is not included with the cost savings the Client Contact Form (CCF) will show an error message and you will need to go back and correct the In-Complete entry before you get credit for it!**

The screenshot shows a web form for client enrollment. At the top, there is a checked checkbox for "32 Enrollment" and a text box containing "\$ 137.1". Below this, a message states: "BOTH the Plan Comparisons and Enrollment Confirmation statements below must be checked to report savings." There are two checkboxes: "Before & After Comparisons on file:" (checked) and "Enrollment Confirmation on file:" (checked). Two red arrows point to these checkboxes. The form has three sections for document uploads: "Current Plan Document" with a date of 6/11/2021 and a file named "2021 1st Trai...MPLATE.docx"; "New Plan Document" with a date of 7/1/2021 and a file named "2021 2nd IVT Email.docx"; and "Confirmation Document" with a date of 6/11/2021 and a file named "2021 Zoom Invite.docx". At the bottom, there are two cost boxes: "PDP/MA-PD Before" with "\$ 157.40" and "PDP/MA-PD After" with "\$ 20.30". A checkbox for "33 Plan Non-Renewal" is at the very bottom.

PDP/MA-PD Before	\$	137.1
PDP/MA-PD After	\$	20.30

# How to Save files to upload:

1) Print to pdf and save in Documents or a specified file on your computer. You can use either Comparison tool or Plan detail.

The screenshot shows the Medicare.gov website interface for plan comparison. The main content area displays two plans: 'Clear Spring Health Premier Rx (PDP)' and 'Cigna Secure Rx (PDP)'. The 'Clear Spring Health' plan is highlighted as the 'Your current plan'. Below the plan details is a table with the following data:

Overview	Clear Spring Health Premier Rx (PDP)	Cigna Secure Rx (PDP)
Star rating	Star rating: Coming Soon	Star rating: Coming Soon
Total	\$40.20	\$31.80
Yearly drug deductible	\$480.00	\$480.00

The 'Drug coverage & costs' section shows a table of drug coverage details for both plans, including pharmacy names and costs. A red arrow points to the 'Yearly drug deductible' row in the overview table.


Overlaid on the right side of the screenshot is a print menu with the following options:

- Print: 2 pages
- Destination: Save as PDF (indicated by a red arrow)
- Pages: All
- Layout: Portrait
- More settings: (dropdown arrow)
- Buttons: Save, Cancel

# How to Save files to upload:

2) Print a 2<sup>nd</sup> copy of the plan/confirmation page to scan and save on computer to upload into Client Contact form.

An official website of the United States government  
[Here's how you know](#) ✓

**Medicare.gov** ← 

Menu

< Back to Plan Results  
Callaway, MO

	Clear Spring Health Premier Rx (PDP)	Cigna Secure Rx (PDP)
	\$40.20 Monthly premium	\$31.80 Monthly premium
	<b>Your current plan</b>	
<b>Overview</b>		
Star rating	Star rating: Coming Soon	Star rating: Coming Soon
Total	\$40.20	\$31.80
Yearly drug deductible	\$480.00	\$480.00
<b>Drug coverage &amp; costs</b>		
Drugs covered/Not covered	<b>5 of 5</b> Prescription drugs covered	<b>5 of 5</b> Prescription drugs covered
Estimated total drug + premium cost	WALMART PHARMACY 10-0025 ✓ Preferred in-network <b>\$2,241.85</b>	WALMART PHARMACY 10-0025 ✓ Preferred in-network <b>\$482.95</b>



# REFERRALS

## Tab

1) Volunteers should not use Cancelled option! Call Center use only.

2) Remember to use Closed/Client did not return.... After making the 3 attempts.

Referral

Referral Status

- Open
- Materials Request Only
- Client Contacted
- Closed
- Canceled

Resolution

- Client did not return emails or phone calls
- Answered general questions
- Appointment scheduled
- Counseled client (created CCF)
- Distributed materials
- Referred to an External Agency
- Other

Notes

Saint Louis County - Would like to reveiw her enrollment in the Medicare Plans including the Part D Plan - MRM

Referral

Referral Status

- Open
- Materials Request Only
- Client Contacted
- Closed
- Canceled

Resolution

- Client did not return emails or phone calls
- Answered general questions
- Appointment scheduled
- Counseled client (created CCF)
- Distributed materials
- Referred to an External Agency
- Other

Notes

Saint Louis County - Would like to reveiw her enrollment in the Medicare Plans including the 6/5/21 10:00am called no answer, 6/6/21 9:30am called no answer, 6/9/21 10:30am called no answer. cc

# Difference in Notes: Referrals/Client/Contact



## Referral Notes:

Used to track Open, Client Contacted or No Contact Referrals for **CLAIM/Site/Volunteer** use.



### Referrals

Referral Date	Assigned Partner	Assigned Volunteer	Referral Status	Resolution	CCF Date	Notes
4/14/2021	MCH/CLAIM	Cindy Carr	Closed	Counseled client (created CCF)	4/26/2021	Cindy Carr will handle this one! CC Called 4-19-21. Caller will call back next week to set up an appointment. CC NOTE: Caller called back and she stated that she will not be available this week but she will next week. CMA ORIGINAL MESSAGE: Boone County - Would like to have a one on one meeting to review her Medicare, Medicaid and SSI Programs - She requested a Counselor other than the counselor that had tried to contact her earlier - Jim House - MRM <a href="#">close</a>

## Client Notes:

Used when Follow-Up is needed after creating a Contact for **Partner/Volunteer** Use. Shows up on HOME tab.



### Client Notes

Updated By	Assigned To	Status	Note	File
Cindy Carr (5/30/2021)	Cindy Carr	Follow-up required	3/15/21 - Bene phoned with questions re Essence MAPD materials rec'd: 1) Needs Member ID to fill out requested Needs Assessment form. Determined this is Essence Member ID; 2) Rec'd MedImpact Rx drug order form . Does she need to complete/submit? Determined this is mail order Rx drug form. She's using CVS so doesn't need to fill out now; 3) \$90 allowance from Essence for non-Rx items in	<a href="#">show history</a>

## Contact Notes:

Used to report to **STARS** what was done to assist the client.



### 10 Notes

Originated from Referral on April 14, 2021
Comments Discussed Medicare options. Client did not understand who pays for what part. Does not qualify for Extra Help or MSP at this time.

# SHIPtools Helpful Hints

- If your system is entering (shadowing) information when filling out the contact form, please clean your cache! Instructions are on [www.missouricclaim.org](http://www.missouricclaim.org) under the volunteer resources.
- You can use your back arrow on the top left of your internet browser to go back to the previous list where you left off.
- Remember in Referrals tab to use “Closed/Client did not return....” After making the 3 attempts to contact client and list date/time in Notes section.
- If you have “Follow-Up Required” listed on your HOME tab, you should click on the name and mark it as “No Action Required” in the client’s notes when completed.
- Check your yearly commitment totals regularly (TEAMS tab) to see if you are meeting your contacts/training numbers for certification. **The End is Near!**
- **If the contact is not in SHIPtools.....it did not happen!** Let your RL know if you need help entering contacts!!!



**You make  
the  
Difference!!!**



*Thank  
you!*

For questions/comments:  
[ccarr@moconnectionsforhealth.org](mailto:ccarr@moconnectionsforhealth.org)  
[twhitney@moconnectionsforhealth.org](mailto:twhitney@moconnectionsforhealth.org)

Or contact your Regional Liaison