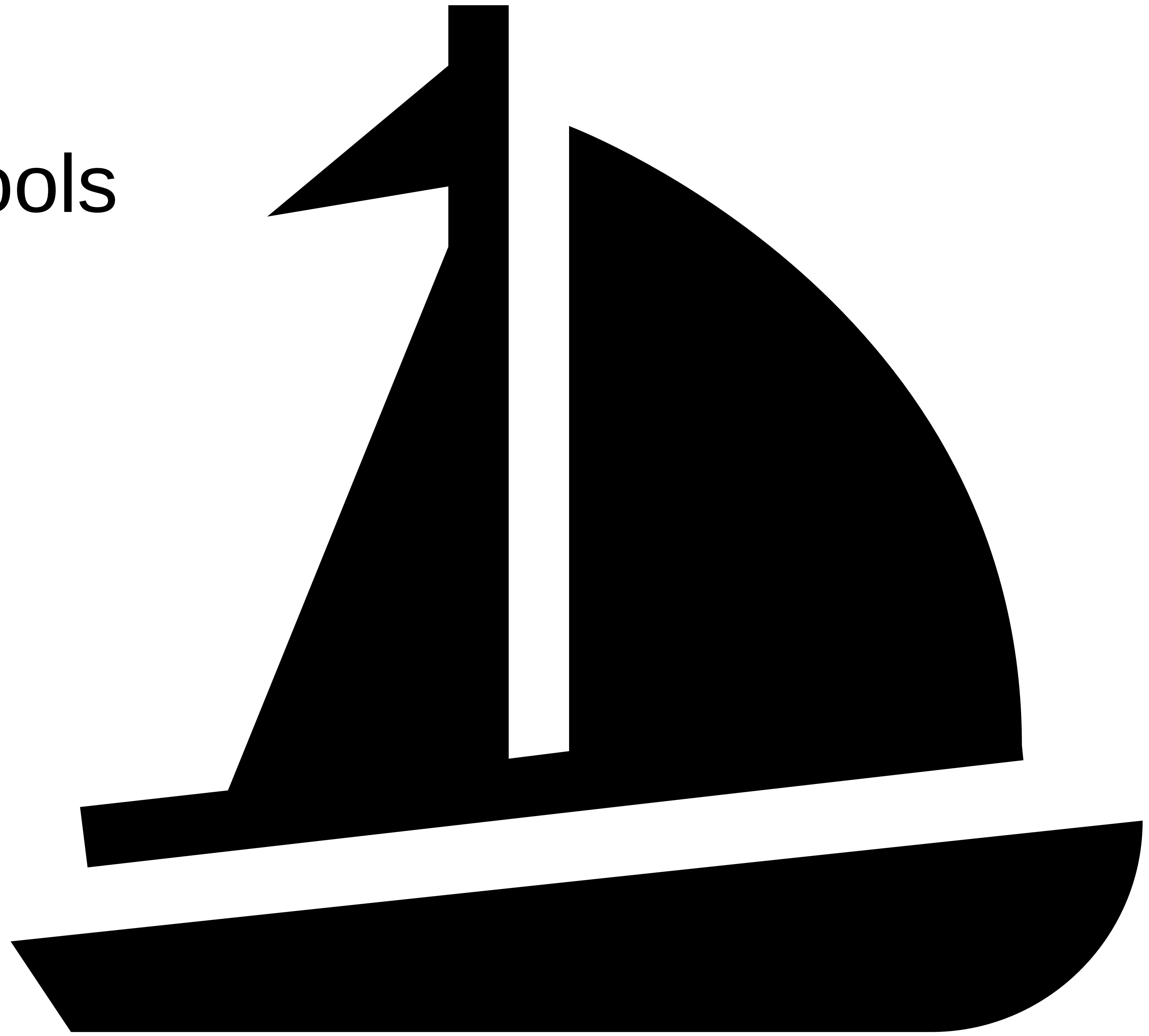
SHIPtools – 2021 Medicare Open Enrollment Tips and Tools For Volunteers

10.5.2021

What you will learn:

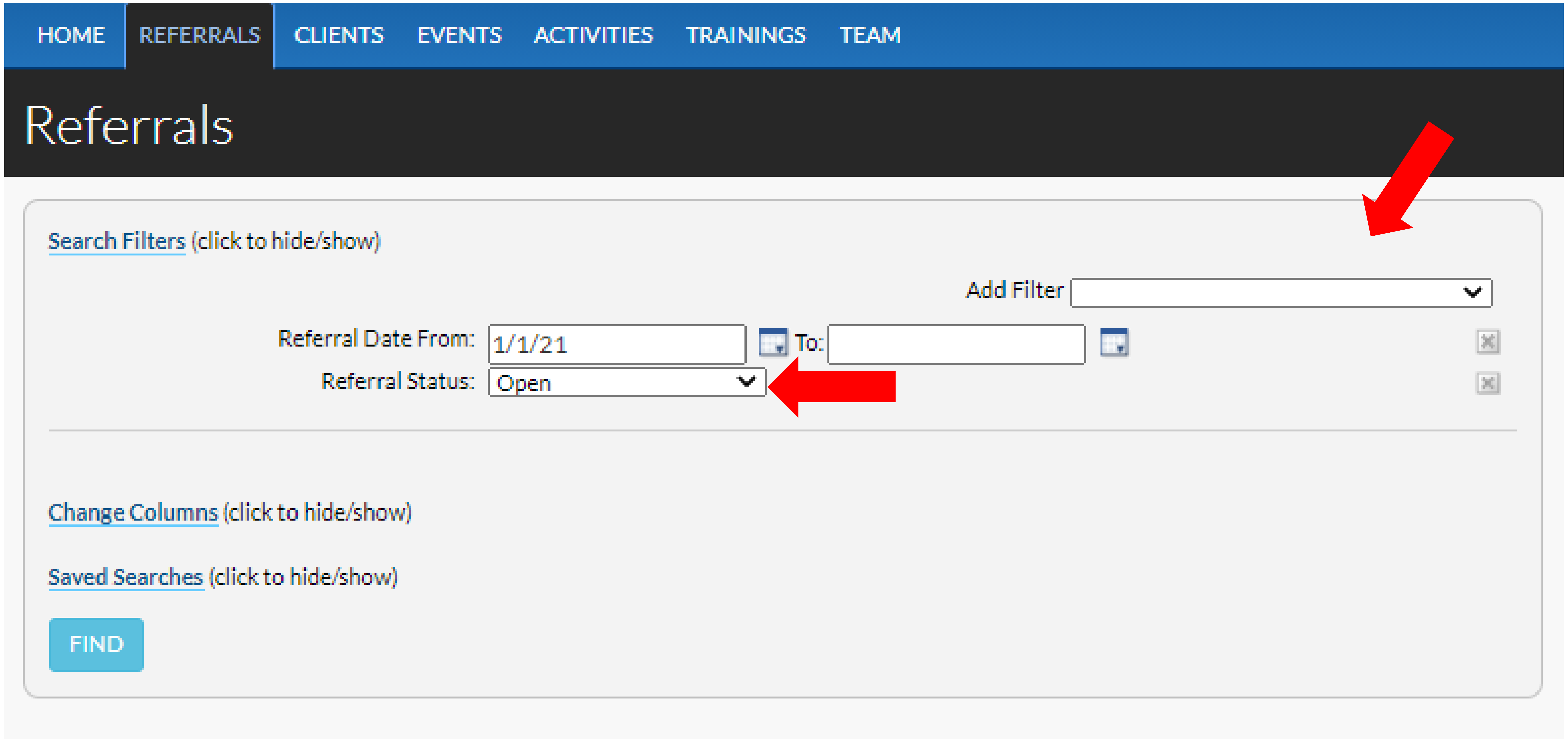
- Review Filter & Sorting Features in SHIPtools
- Entering PDP & MA Costs Savings
- Helpful Hints
- Q&A



All Tabs

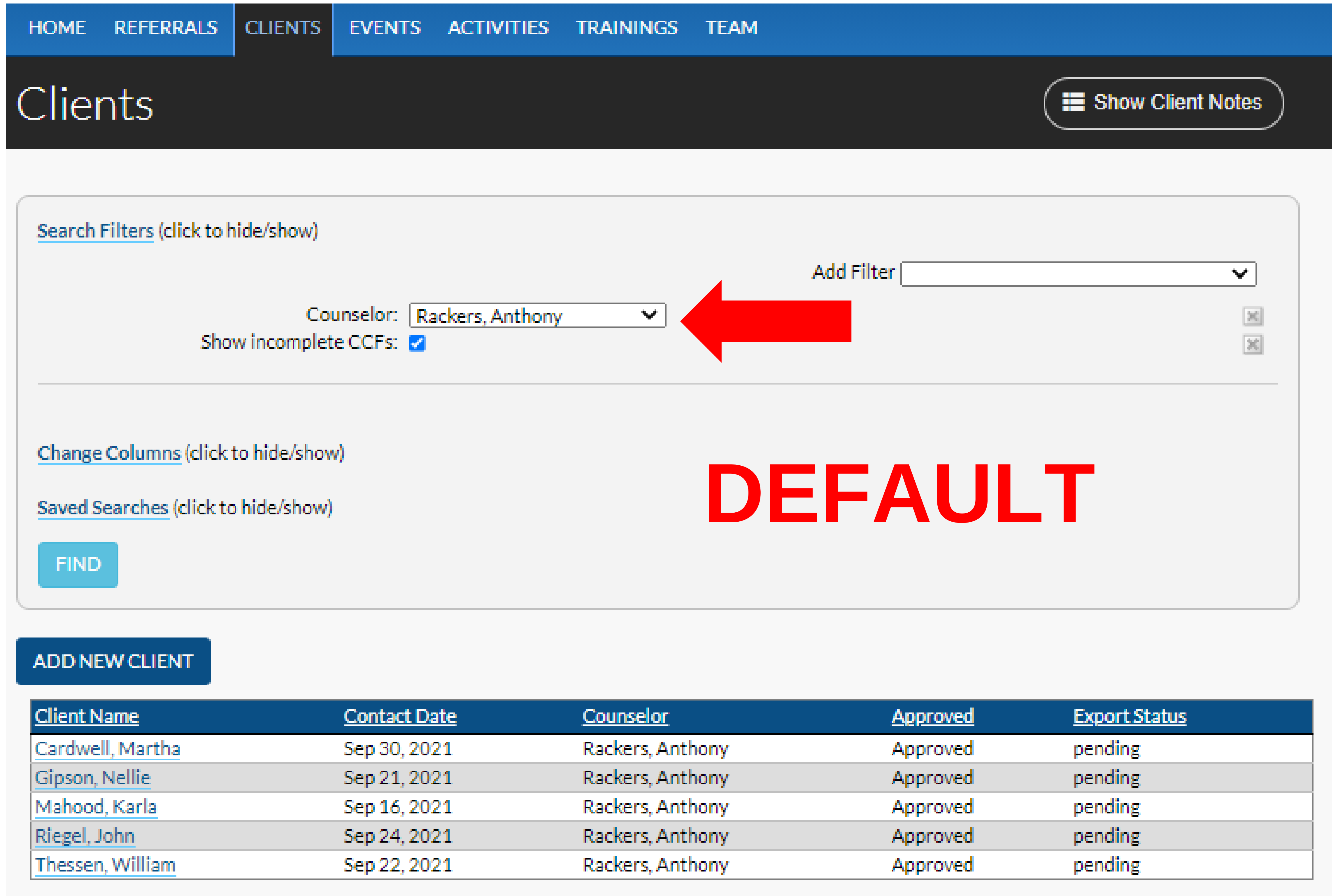
1) Filters are your Friends!

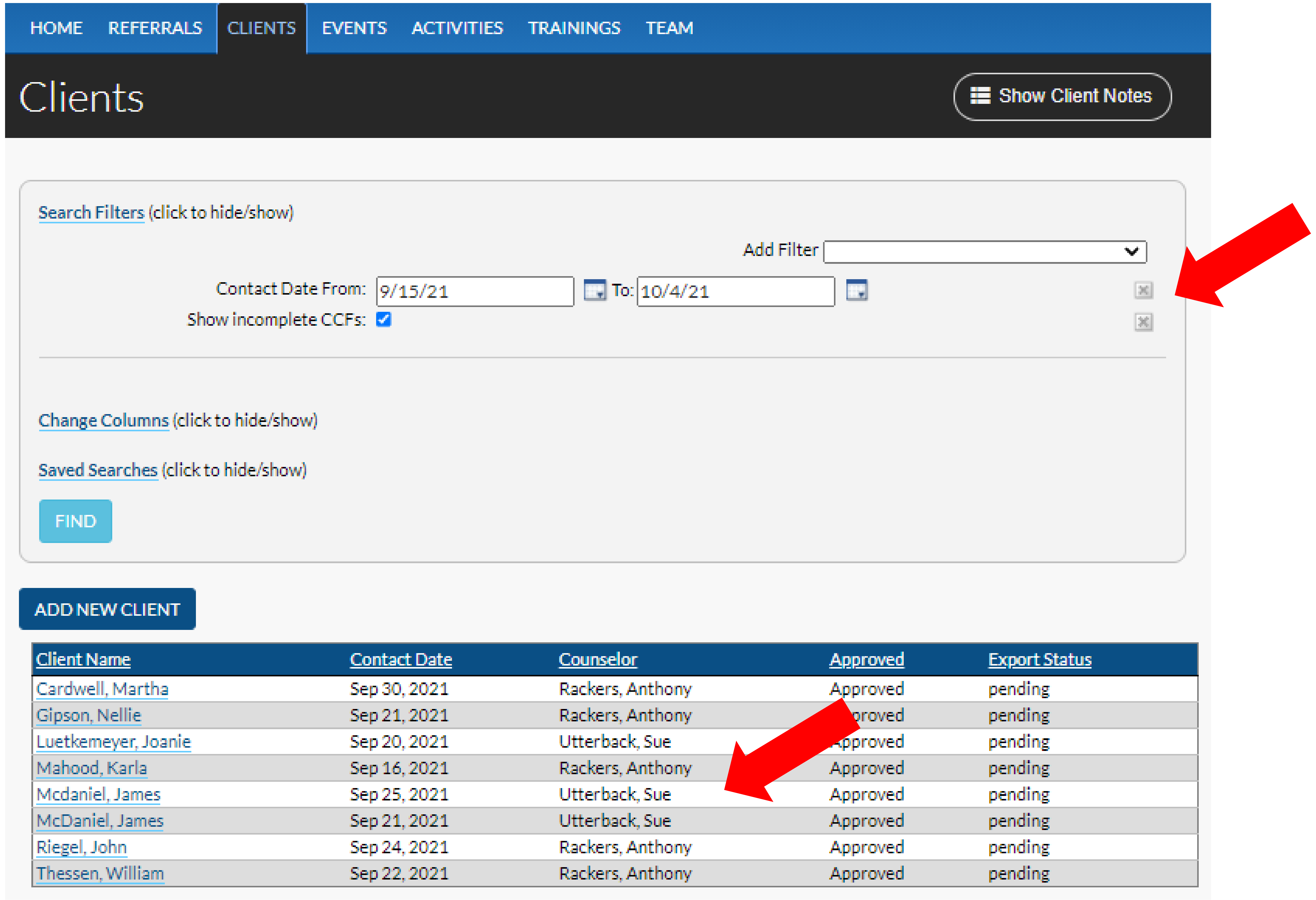
Use the Filter feature to find the data you need or…….



All Tabs

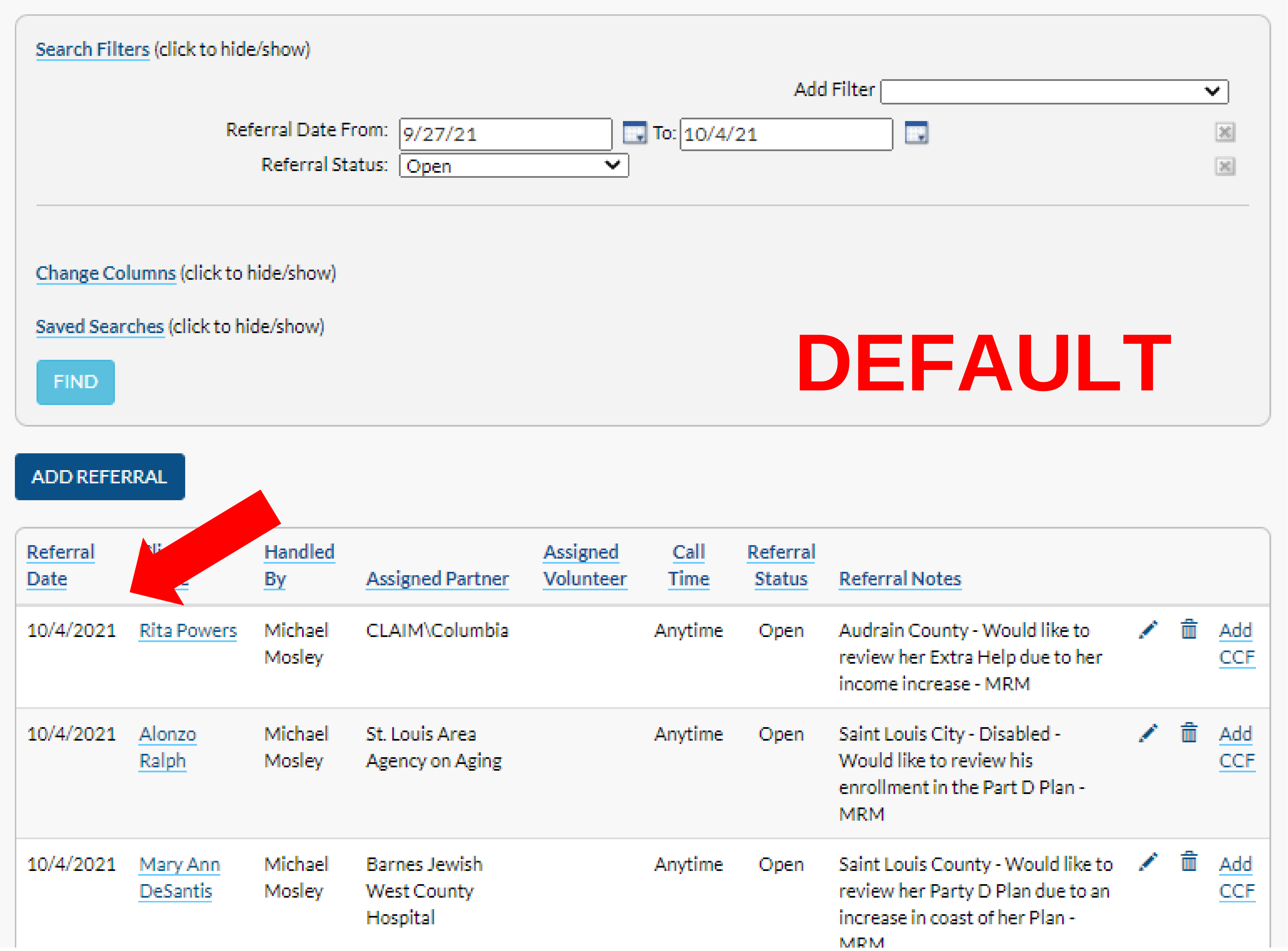
Delete a Filter to see more!

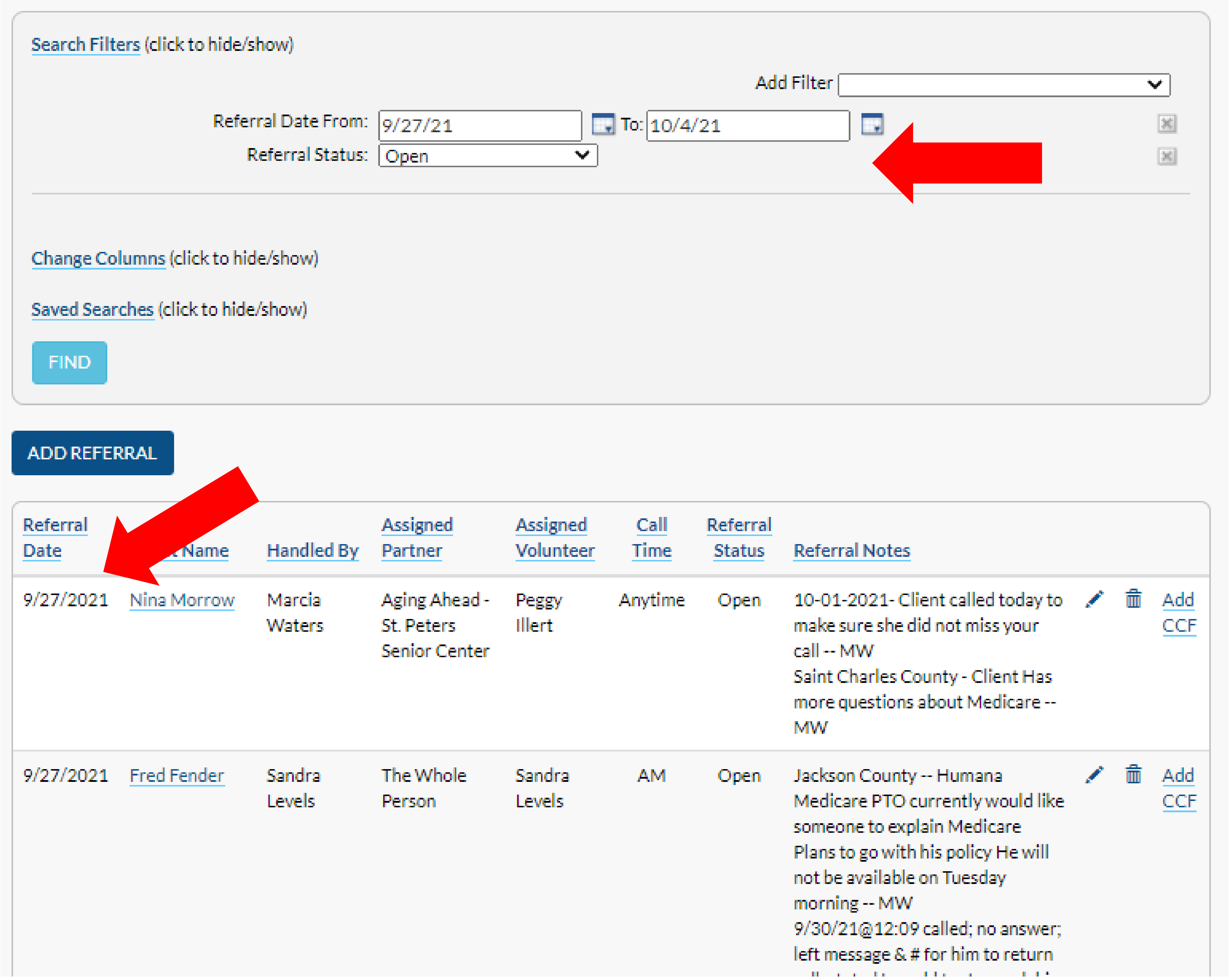




You can enter another Client Contact that your co-worker helped before

All Tabs –
Sort all detail columns by clicking on them





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!)**

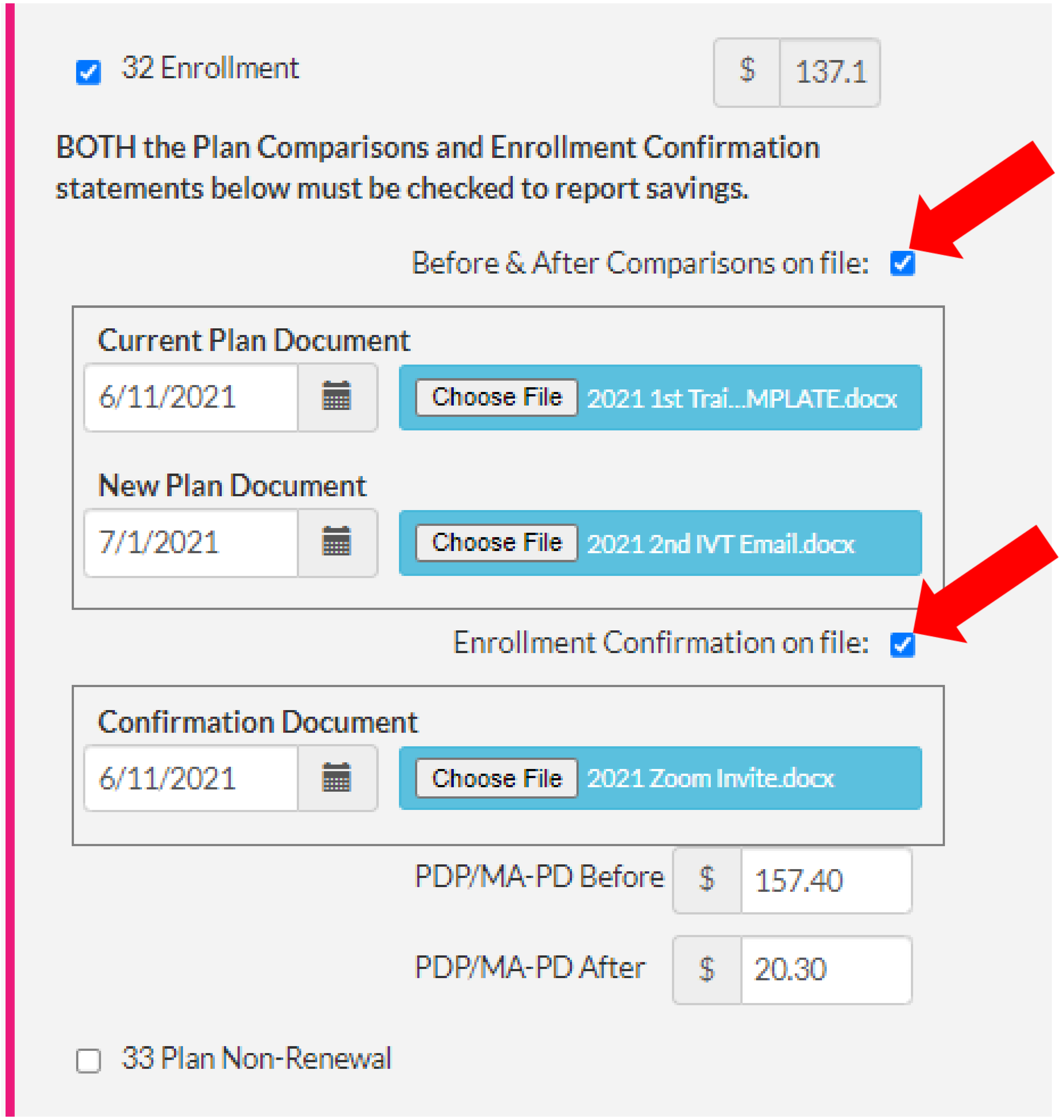
1) Save the Plan Finder Documents and Enrollment confirmation in a secure file, thumb drive or computer.

2) Put in the date of Current Plan and New Plan

3) Click on Choose File button to attach the files.

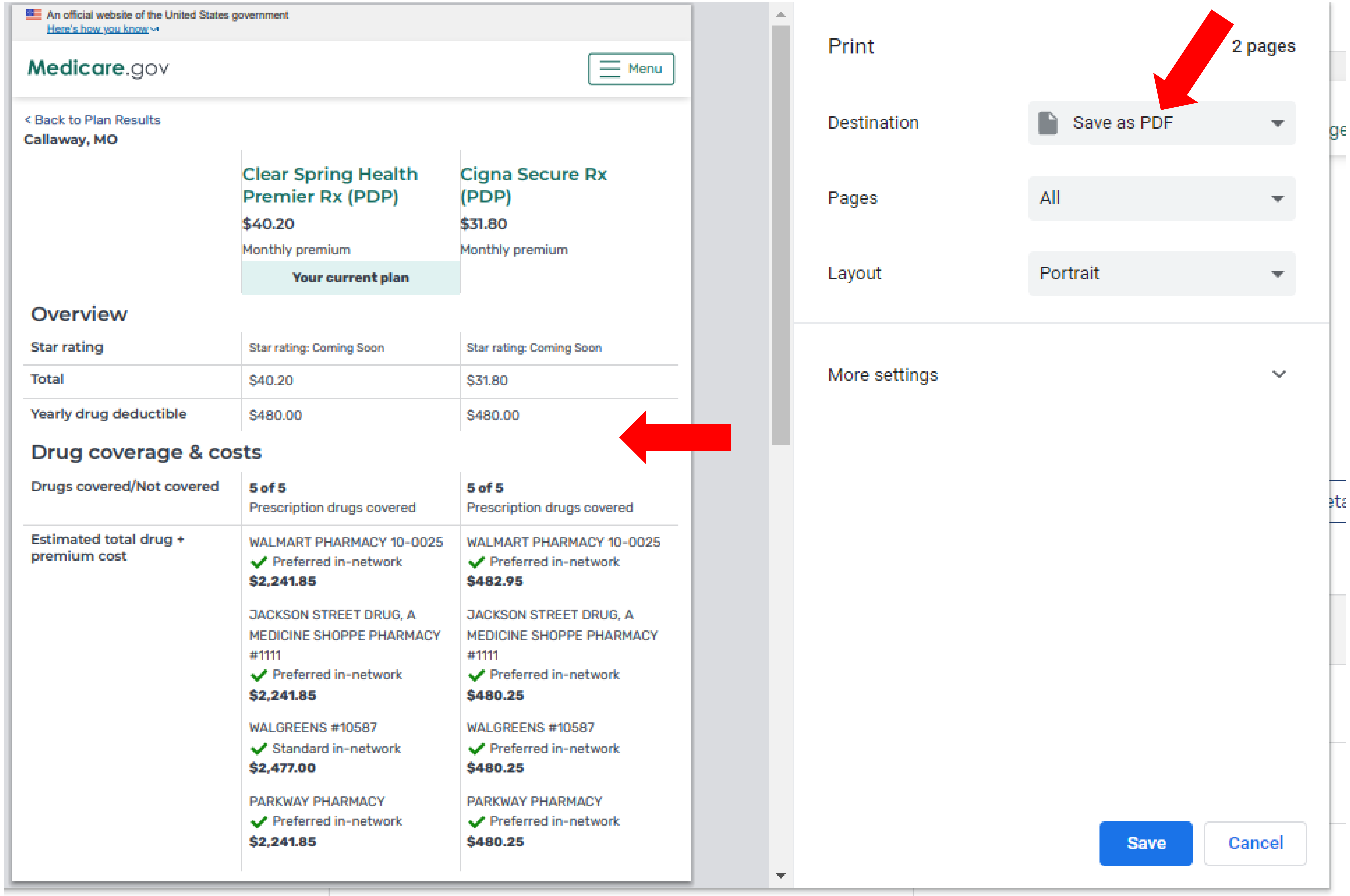
4) When you put in the cost of old/new plan, the system will figure the savings for you.

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!



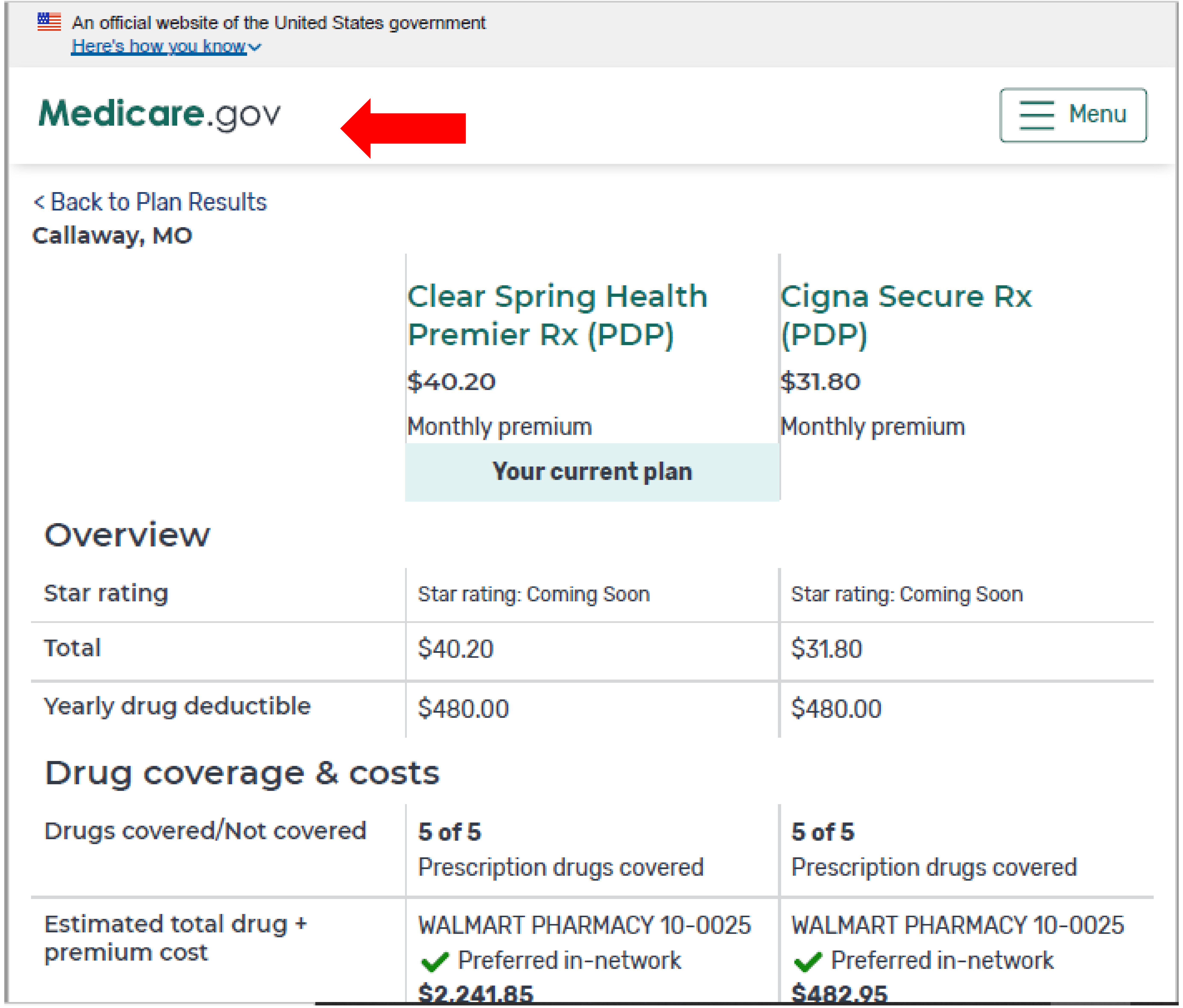
How to Save files to upload:

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



How to Save files to upload:

2) Print a 2nd 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
	Your current plan	

Overview

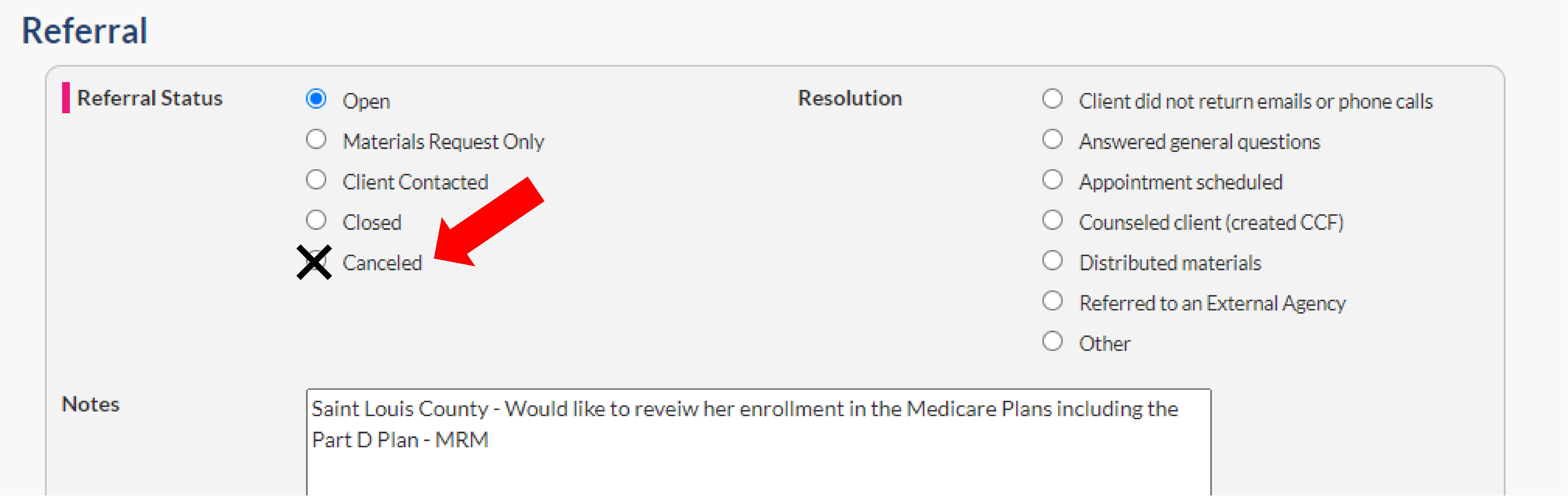
Star rating	Star rating: Coming Soon	Star rating: Coming Soon
Total	$40.20	$31.80
Yearly drug deductible	$480.00	$480.00

Drug coverage & costs

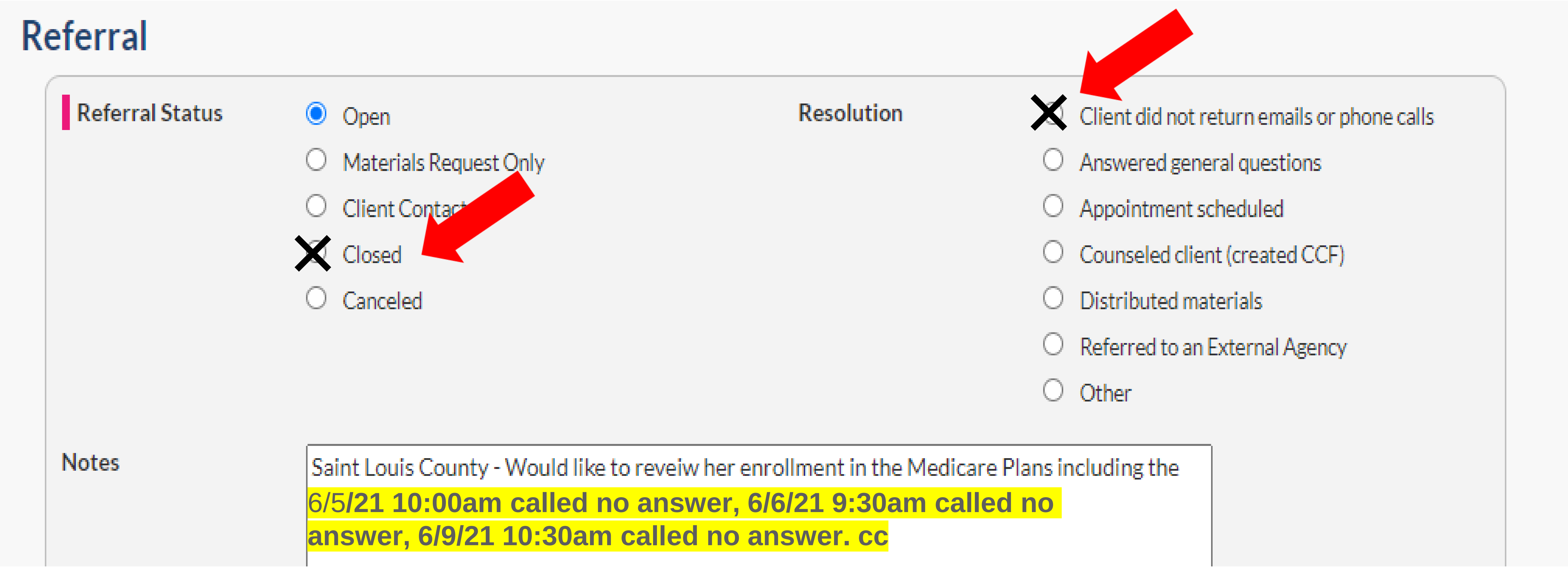
Drugs covered/Not covered	**5 of 5** Prescription drugs covered	**5 of 5** Prescription drugs covered
Estimated total drug + premium cost	WALMART PHARMACY 10-0025 ✔ Preferred in-network **$2,241.85**	WALMART PHARMACY 10-0025 ✔ Preferred in-network **$482.95**

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.



Difference in Notes: Referrals/Client/Contact

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

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

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

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 close

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	show history

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.missouriclaim.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!!!

For questions/comments:
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Or contact your Regional Liaison