



## **CMS Unique ID Number Procedures for SHIIP Volunteers**

**Volunteer Name:** \_\_\_\_\_

**Unique ID Number:** \_\_\_\_\_

SHIIP volunteer counselors and staff at times contact 1-800-MEDICARE, Medicare Advantage and Medicare Part D plans on behalf of clients. Under the HIPPA Privacy Rules and guidelines for “Unique ID Numbers” the following procedures should be followed when contacting these parties on behalf of clients.

1. Verify that the client has the authority to request information from Medicare or the plans. When the client is the beneficiary involved with the claim additional verification is not necessary. When the client is a spouse, family member or other individual you need to verify their legal authority to act on behalf of the beneficiary before contacting Medicare or the plans (see chart on back of this page).
2. The client must sign both signature lines on the “Client Notice.” The signature in the box indicates that they have given you permission to contact third parties on their behalf. If you have seen the client previously and they signed only the first line on the “Client Notice”, you must have them sign the second signature line before contacting Medicare. Give the client the yellow copy and keep the white copy on file at your sponsor site or send it to SHIIP to file. You may want a copy of the signed form for future reference. A “Client Notice” only needs to be signed once in a calendar year.

If counseling is done by telephone, please mail a Client Notice to the client and ask them to sign both sections of the Notice and return it to you. This must be received by the SHIIP counselor before the Unique ID is used to make calls.

3. Your first choice for authorization is to either get verbal or written authorization from the beneficiary that is provided directly to the third party. When neither of these is available as an option the Unique ID Number should be used. The procedure when using the Unique ID Number is:

### **Calling Medicare:**

Call Medicare at the special SHIP-only number-- **1-888-647-6701**. (This phone number is only for the use of SHIP counselors and **cannot be given to anyone else**. You must have a Unique ID number to use this number.)

- When you call 1-888-647-6701, an automated voice will prompt you to enter your Unique ID using the telephone key pad.
- Enter your assigned Unique ID number.
- Assuming that the correct ID is entered, you will hear a very brief menu of options as follows:

Press 1 for General Medicare issues (these include Part D questions, calls to enroll in a Part D plan and Medicare Advantage questions)

Press 2 for hospital issues to reach a Part A agent

Press 3 for physician issues to reach a Part B agent

Press 4 for medical equipment issues to reach an agent durable medical equipment (DME)

Press 5 to disenroll from a Part D plan

- If you enter your Unique ID correctly, you will receive a very brief list of options from a recorded menu (described in the next bullet point). If you do not enter the Unique ID correctly or enter an invalid Unique ID, you will hear the regular menu of options presented to all callers who call 1-800-MEDICARE. So, if you see no difference in the menus, you are likely entering invalid Unique IDs.
- The efficiency in this system comes from selecting the appropriate option from this menu. The menu is designed to be very short and to the point to encourage you to listen and select the appropriate option. It is purposely not as long and descriptive as the menus for accessing customer service representatives through the 1-800-MEDICARE number, as CMS assumes SHIP counselors can use the shorthand menus described above. If you do not choose the appropriate option will not see increased efficiency from the system.

- Identify the beneficiary (\*\*make sure you have this information before you call Medicare)
  - \*full name as found on the Medicare card
  - \*date of birth
  - \*Medicare #
  - \*one additional piece of information—address, phone #, effective dates of Medicare Part A & B (found on Medicare card), Social Security number [Have all of this information before you call Medicare.]
- It is important to note that this number will not bypass or put you in any kind of priority wait for a customer service representative. If there is a wait time for callers to 1-800-MEDICARE, you will experience that wait. However, during our 5-month pilot, SHIPs reported a significantly enhanced experience and shorter call times as the quick menu and appropriate routing to the correct type of CSR created a much more efficient call for SHIP counselors.

**Calling Part D or Medicare Advantage Plans:**

Call the plan phone number in the chart provided. Not all plans recognize the Unique ID number. **Only use** the Unique ID with plans on the list. You will **verbally** provide Unique ID information to the customer service representative at the plan.

- Identify yourself
  - \*full name (as shown on the front of this page)
  - \*state program name—Senior Health Insurance Information Program
  - \*state you are calling from—Iowa
  - \*Unique ID Number—give your assigned Unique ID number.
- Identify the beneficiary (\*\*make sure you have this information before you call Medicare)
  - \*full name as found on the Medicare card
  - \*date of birth
  - \*Medicare #
  - \*one additional piece of information—address, phone #, effective dates of Medicare Part A & B (found on Medicare card), Social Security number [Have all of this information before you call plan. Having the client’s plan ID number would also be a good idea.]

