MIPPA Protocols for Senior LinkAge Line®

I. Goals

- Consumer will be made aware of Medicare Savings Programs and the benefits of each
- Consumer will receive application assistance in the manner they choose, such as phone-based or in-person assistance
- Consumer will receive information on additional financial assistance programs, such as food support or energy assistance

II. Key Messages

- There is help for prescription drug costs
- There is additional help paying for the Medicare Part B premium
- You can receive application assistance for Medicare Savings Programs in a way that is convenient for you
- If you received an application and cover letter from the Department of Human Services, it is very important that the cover letter is returned with the application

III. Protocols

A. Receiving Beneficiary Names

- On a daily basis a member of the Consumer Choices Team will pull the report of names the state Medicaid agency has received from Social Security. This list of names consists of individuals who have applied for Extra Help through Social Security and should now be considered for MSP eligibility.
- A designated Consumer Choices Team staff member will enter the basic information for each beneficiary into Web Referral, assigning a follow-up to a beneficiary's local Area Agency on Aging region or designated staff. For example, an individual in Itasca County will be assigned to the user "Arrowhead" for a follow-up. The follow-up will be assigned for 7 calendar days after the name was entered into Web Referral. MIPPA follow-ups will have the instructions, **"MIPPA: Please contact consumer for application assistance."** If a follow-up is assigned for a weekend, staff may complete the follow-up the following Monday.
- On a daily basis, the designated SLL staff shall check and complete the list of follow-ups.
- It is possible to have the designated SLL staff reassign the follow-up to another Senior LinkAge Line® specialist.

B. Completing an Follow-Up and Creating a New Inquiry

- Designated SLL staff shall conduct a call with each MIPPA beneficiary on their follow-up list during which time the specialist will complete the follow-up and begin a new inquiry.
  - *Hello, my name is (name of SLL staff). I am calling from the Senior LinkAge Line® because you should have received an application for the Minnesota Health Care Programs to apply for a Medicare Savings Program. This application would have been sent with a cover letter*

explaining why you are receiving an application. Do you remember receiving this application?

- If they have received the application:
    - *Did you read the cover letter?*
    - *Do you have any questions?*
    - *Have you made a decision on if you would like to apply for a Medicare Savings Program?*
    - *Would you like assistance filling out your application? I can set up an appointment for you with a highly trained volunteer. They will assist you with filling out your application and making sure you have all of the correct documentation, including your cover letter, with the application.*
- If they have not received the application:
    - *You should have received an application that came with a cover letter explaining that you may be eligible for a Medicare Savings Program. You would have received the application because you applied for Extra Help through Social Security. When you applied your information was also to be used to begin a Medicare Savings Program application. This is the application that should have come in the mail. Do you know about Medicare Savings Programs?*
    - If they state no, explain the various Medicare Savings Programs.
    - *Would you be interested in applying for a Medicare Savings Program? If you would like I can set up an appointment with for you with a highly trained volunteer. They can help you complete your application, making sure you have all of the correct documentation and answer any questions you have.*
- If the consumer declines an in-person visit, but requests assistance over the phone, the SLL staff may assist the individual with completing their application. SLL staff may complete a fillable PDF application that is available online at http://edocs.dhs.state.mn.us/lfserver/Public/DHS-3417-ENG.
    - Upon sending the completed application to the consumer for signature, the SLL staff should send a cover letter (Attachment C) created by the Consumer Choices Team informing the consumer of the appropriate documentation that must be sent with the application. **At the top of the application, staff should apply a sticker or write "Applying for Medicare Savings Program Only" or specify the exact MSP the individual is applying for.**
    - Staff should also discuss other financial assistance programs that may be helpful for the consumer, such as food support and energy assistance. Application assistance should be provided for these programs if the consumer is interested in applying. **Please note:** At this time a consumer may return the cover letter with the Combined Application Form (CAF) for food support,

cash assistance and health care programs. However, as the county will need to request additional documentation than is requested in the CAF to determine health care eligibility, the process may be delayed while consumer and county gather and complete the needed verifications.

  - Currently, choose the Problem/Needs: **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance**, as well as other necessary Problem/Needs.
  - SLL staff should use the **Assistance** screen to choose **Medicare Savings Program (MSP)** and **Minnesota Health Care Programs (MHCP)**, along with any other application that was completed, under the **Type of Application Completed field** in addition to the Problem/Needs entered above.
  - Complete a log note for the inquiry using the log note header, "**MIPPA – Phone Based Application Assistance"**
  - Should the consumer need to gather additional information in order to complete an application, the SLL staff shall set a date and time for a follow-up call with the consumer to finish completing the application.

- If the consumer agrees to an in-person visit, the SLL staff should schedule an appointment using the protocols developed by the specific contact center. Staff should inform the consumer of the information that will be needed for the volunteer to assist the consumer with completing the application, including documentation. If the appointment is at least four days in the future, the SLL specialist should mail a letter developed by the Consumer Choices Team (Attachment D) listing the documents needed for the appointment.
- SLL staff should complete the inquiry by documenting all pertinent information, including the Problem/Need **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance** and using the log note header, "**MIPPA – Appointment scheduled for application assistance."**
- Should the phone number listed for the consumer be incorrect, out of order or not available, staff shall mark this in a log note and choose the Problem/Needs **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance** and the log note header, "**MIPPA – Incorrect or unavailable phone number."** A letter (Attachment B) created by the Consumer Choices Team shall be sent to the individual informing them why they are being contacted, as well as information regarding contacting the Senior LinkAge Line® for application assistance.
- Should the consumer refuse any assistance, staff should mark this in the log notes and choose the Problem/Needs **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance** and the log note header, "**MIPPA –**

Beneficiary refused assistance". Within the log notes, please mark the reason assistance was declined.

- Should the consumer not be available at the time of the initial call, the SLL specialist should schedule a follow-up for three business days later to attempt contact with the consumer. This should be noted in the log notes and the Problem/Needs **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance** should be chosen and the log note header should read, "**MIPPA – Beneficiary not available."**
  - Should the consumer not be available after the second attempt, a message should be made for the consumer to contact the Senior LinkAge Line® for application assistance with the Medicare Savings Programs and the standard letter (Attachment B) will be sent to the consumer offering application assistance in the future. Senior LinkAge Line® staff may then close the inquiry after creating a log note with the header, "**MIPPA – Beneficiary not available"** and marking the Problem/Needs **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance.**

C. In-Person Assistance Provided

- The volunteer or SLL outreach staff will meet with the consumer at a convenient location for them, including their home.
- The focus of the visit will be to assist the individual with completing the application. However, the volunteer or SLL staff should also discuss other financial assistance programs, such as food support or energy assistance. Application assistance should be provided for these programs as well. This may mean having copies of the applications on hand or having access to a computer with Internet access and a printer.
- If a computer with a secure Internet connection is available the SLL staff member should directly enter the client data into Web Referral.
- If a secure Internet connection is not available or if the visit is being completed by a volunteer, the volunteer or SLL staff shall using the client tracking form to record client information, as well as the topics discussed during the visit. All paper forms must be entered into the client tracking tool as soon as Web Referral is available.
- Upon completing the application with the consumer, SLL staff or volunteer should ensure the application is sealed in an envelope that is addressed to the county of residence.
  - If the consumer received the application in the mail with a cover letter, ensure the cover letter is included with the application. The consumer should have checked the appropriate box expressing their preference to be screened for Medical Assistance eligibility and MSP eligibility or only be screened for Medicare Savings Program eligibility. A return envelope should have been sent with the cover letter and application as well.

- If the consumer did not receive an application in the mail, the volunteer or SLL staff should have an extra envelope available which can be used to mail the application to the consumer's county of residence.

IV. Step-by-Step

A. Completing a Follow-Up and New Inquiry

1. Log on to Resource House Web Referral by going to https://www.minnesotahelp.net/referral. Enter your username and password, then click the "Sign In" button making sure SLL is chosen for Database and Role.

2. On the Homepage, under the list of Follow-Ups, choose the local regional AAA name under "Operator". Choices are LODS-Warren, LODS-Fergus Falls, Arrowhead, Central, MinnesotaRiver, SoutheasternMinnesota and Metro.

3. Click on the **"Date"** of the follow-up that will be completed. View the follow-up instructions for the client to determine if they are a MIPPA client. Follow-up instructions for MIPPA should read, "**MIPPA: Please contact consumer for application assistance.**"

4. Complete the follow-up following the instructions below. It is not necessary to close the follow-up and begin a new inquiry. MIPPA work at this point may be completed through the follow-up function.

5. Call the consumer using Revation at the phone number listed in the client record.
   a. Should the phone number listed for the consumer be incorrect, out of order or not available, staff shall mark this in a log note and choose the Problem/Needs **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance** with the log note heading "**MIPPA – Incorrect or Unavailable phone number.**" Staff should also send the standard letter (Attachment B) created by the Consumer Choices Team informing them of the reason for the letter, as well as information regarding contacting the Senior LinkAge Line® for application assistance.
   b. Should the consumer refuse any assistance, staff should mark this in the log notes and choose the Problem/Needs **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance** and the log note header, "**MIPPA – Beneficiary refused assistance".** Please include the reason for refusing assistance in the log notes.
   c. Should the consumer not be available at the time of the initial call, the SLL specialist should schedule a follow-up for three business days later to attempt contact with the consumer. This should be noted in the log notes and the Problem/Needs **025.395 QI-1 – Application**

Assistance, 025.409 QMB – Application Assistance and **025.423 SLMB – Application Assistance** should be chosen and the log note header should read, "**MIPPA – Beneficiary not available."**

i. Should the consumer not be available after the second attempt, a message should be made for the consumer to contact the Senior LinkAge Line® for application assistance with the Medicare Savings Programs and a standard letter (Attachment B) shall be sent to the consumer offering application assistance in the future. Senior LinkAge Line® staff may then close the inquiry after creating a log note with the header, "**MIPPA – Beneficiary not available"** and marking the Problem/Needs **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance.**

6. Complete the **Basic Data** screen.

7. Complete all other necessary fields, including all income/asset and benefits information discovered on the call. If application assistance is completed, all information needed to complete the application should be entered into Web Referral.

   a. If application assistance is provided over the phone, mail the application along with an instructional letter (Attachment D) informing the consumer what documentation needs to be included with the application and an envelope addressed to the consumer's county of residence. In addition, staff should place a sticker or write, "Applying for MSP only" or specify the MSP program the individual is applying for, such as "Applying for QI-1 Only"

   b. If application assistance is provided and an application is completed, under the Assistance screen within Web Referral, **Medicare Savings Program (MSP)** and **Minnesota Health Care Programs (MHCP)** should be checked under the **Type of Application Completed** field.

8. Should the consumer request in-person application assistance the SLL specialist shall schedule a meeting with a volunteer or outreach staff per regional protocol at the most convenient location for the consumer.

9. Select the appropriate **problem/needs** for the caller. To do this, click on "Add New Search" on the left, then find and apply the appropriate problem need to the record. After clicking the check box to the left of **the Problem Need(s)**, be sure to click on the "Assign Picks" button at the bottom of the list. When you're finished applying the problem/needs, click on the "Close Search Setup" link in the upper right corner. ***Be sure you check problem/needs for all topics discussed.***

   a. All consumers should have at least the following Problem/Needs checked: **025.395 QI-1 – Application Assistance, 025.409 QMB –**

Application Assistance and **025.423 SLMB – Application Assistance**

10. Complete a log note for the inquiry.
    a. If an appointment was scheduled for in-person assistance, enter the log note heading, "**MIPPA – Appointment scheduled for application assistance"**
    b. If application assistance was provided over the phone, enter the log note heading, "**MIPPA – Phone based application assistance"**

11. Complete **Review Main Page**
    a. **Contacted by:** Enter Senior LinkAge Line®
    b. **Call or Contact Made By:** Enter Senior LinkAge Line®
    c. **Contacts Out:** At least one contact out should be entered. Enter additional contacts out for three-way calls or information mailed to consumer including a completed application for the consumer to sign.
    d. **Heard About SLL, DLL, VLL**: Choose Senior LinkAge Line Outbound
    e. **Survey Sent**: If a survey is sent to the individual, choose the appropriate survey
    f. **In Person Assistance**: Telephone should be selected
    g. **Type of Services**: Information/Referral/Assistance should be selected

12. Schedule a follow-up if necessary. For example, to remind outreach staff of the appointment or to call the consumer back to finish completing the application.
    a. Click on the **Schedule Follow-up** link in the left "Take Me To" section under the "More Options" heading.
    b. Change the **Follow-Up Date** to fall within the appropriate number of days, in most cases within 10 business days.
    c. Enter the name of the appropriate staff in the **Follow-Up Assigned To** field.
    d. In the **Follow-Up Instructions** field enter the reason for follow up, such as Complete MHCP application.
    e. Click on the "Save Complete" button at the top of the page to save this record as complete.

B. Completing an Inquiry after an In-Person Visit

1. Inquiries for In-Person Visits related to MIPPA should be entered as soon as access to Web Referral is available.
2. Log on to Resource House Web Referral by going to https://www.minnesotahelp.net/referral. Enter your username and password,

then click the “Sign In” button making sure SLL is chosen for Database and Role.

3. On the Homepage, choose “New Inquiry” at the top of the screen.

4. Enter the phone number or first and last name of the consumer and press match. All individuals assisted for MSP application assistance in relation to MIPPA should have a record within Web Referral.

5. Click on the name of the consumer. This will open a new inquiry record for this consumer.

6. Complete the **Basic Data** screen if information is incomplete.

7. Complete all other necessary fields, including all income/asset and benefits information discovered during the visit. Information gathered to complete the MHCP application should be entered into the inquiry record. Examples include income, assets and disability information.

    a. Using the **Assistance** screen within Web Referral, check **Medicare Savings Program (MSP)** and **Minnesota Health Care Programs (MHCP)** under the **Type of Application Completed** field. If other application assistance was provided, check all other appropriate applications.

8. Select the appropriate **problem/needs** for the caller. To do this, click on “Add New Search” on the left, then find and apply the appropriate problem need to the record. After clicking the check box to the left of **the Problem Need(s)**, be sure to click on the “Assign Picks” button at the bottom of the list. When you’re finished applying the problem/needs, click on the “Close Search Setup” link in the upper right corner. ***Be sure you check problem/needs for all topics discussed.***

    a. At least the following Problem/Needs should be checked: **025.395 QI-1 – Application Assistance, 025.409 QMB – Application Assistance** and **025.423 SLMB – Application Assistance**

9. Complete a log note for the inquiry with the header reading, “**MIPPA – In-person application assistance provided”**

10. Complete **Review Main Page**

    a. **Contacted by:** Enter Senior LinkAge Line®

    b. **Call or Contact Made By:** Enter Senior LinkAge Line

    c. **Contacts Out:** At least one contact out should be entered. Enter additional contacts out for three-way calls or for information given to consumer.

    d. **Heard About SLL, DLL, VLL**: Choose Senior LinkAge Line Outbound

e. **Survey Sent**: If a survey is sent to the individual, choose the appropriate survey

f. **In Person Assistance**: Choose the appropriate venue where assistance was provided, such as Library or Home – Own House.

g. **Type of Services**: Information/Referral/Assistance should be selected

11. Schedule a follow-up if necessary. For example, additional concerns/issues arose that the SLL volunteer or staff must follow up on.

    a. Click on the **Schedule Follow-up** link in the left "Take Me To" section under the "More Options" heading.

    b. Change the **Follow-Up Date** to fall within the appropriate number of days, in most cases within 10 business days.

    c. Enter the appropriate name in the **Follow-Up Assigned To** field.

    d. In the **Follow-Up Instructions** field enter the reason for follow up, such as Complete MHCP application.

    e. Click on the "Save Complete" button at the top of the page to save this record as complete.

End of Protocols