



CMS SHIP Unique ID: Counselors

When viewing this job aid electronically, click within the Contents to advance to desired page.

Contents

- Purpose1**
 - Who is Eligible for a Unique ID 2
 - Definition of an Active Counselor 2
- Process Overview.....2**
- Unique ID Training and Paperwork3**
- Unique ID Creation in STARS3**
 - Receiving Your Unique ID Number 3
- Unique ID Effective Dates4**
 - 120 Day Inactivity Rules 4
- Unique ID User Instructions6**
 - Reasons to Use Your Unique ID 6
 - Limitations to the Unique ID 6
 - Calling Medicare with Your Unique ID 6
- Unique ID Forms and Resources.....7**
 - Technical Assistance 7

Purpose

The CMS SHIP Unique ID is a collaborative effort between the U.S. Administration for Community Living (ACL), the Centers for Medicare & Medicaid Services (CMS), and State Health Insurance Assistance Programs (SHIPs) to provide priority access to 1-800 Medicare Customer Service Representatives (CSRs) and representatives from participating Medicare Advantage and Part D plans. It is designed to remove barriers when researching complex issues regarding Medicare.

Without it, SHIP counselors could not access 1-800-Medicare or participating plan representatives on behalf of beneficiaries regarding services, claims, or providers unless the beneficiary initiated the call in the presence of the SHIP counselor. That is simply not feasible in most situations.



Who is Eligible for a Unique ID

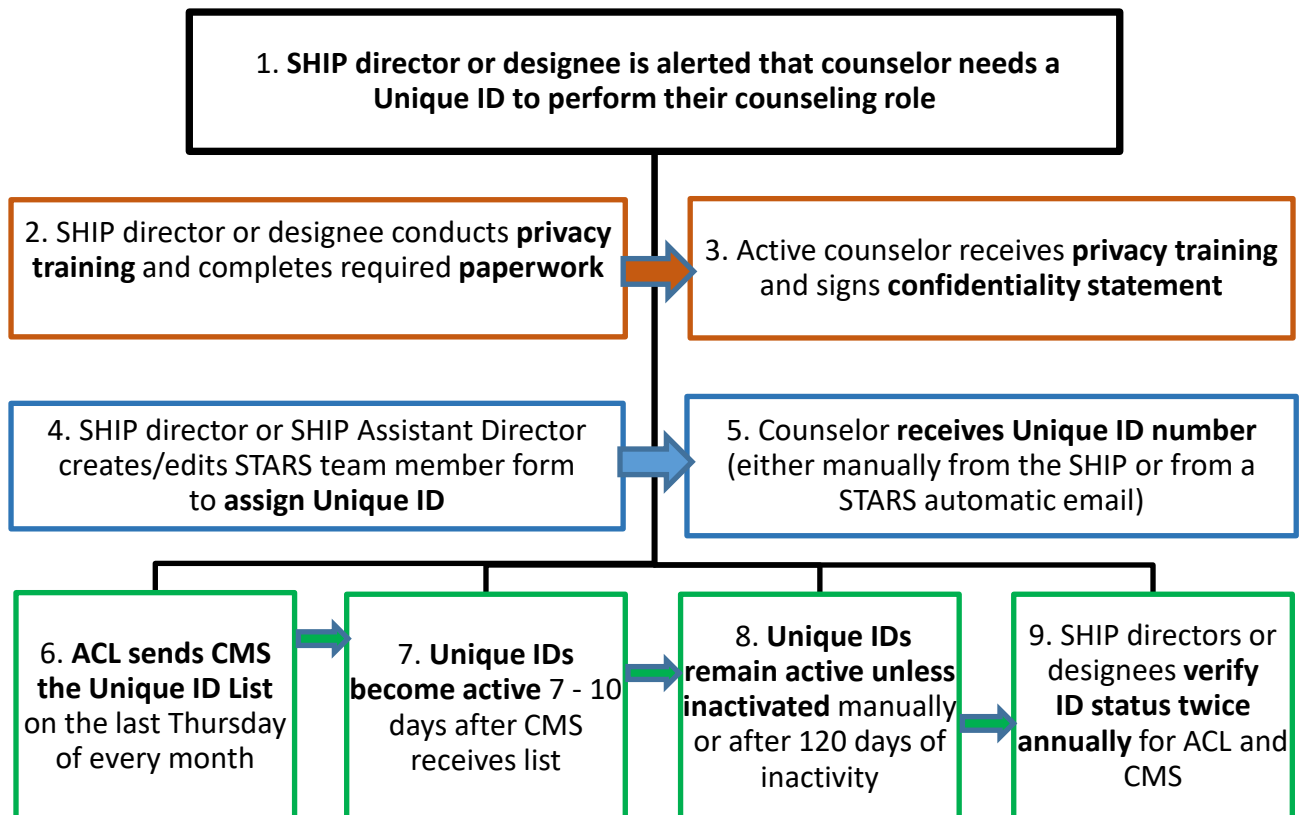
The CMS Unique ID is intended for Active Counselors who have been screened, have completed a Confidentiality Agreement, and have received privacy training from their SHIP program.

Definition of an Active Counselor

Individuals who provided counseling, information, or assistance related to Medicare or other health insurance for a SHIP during the 12-month reporting period. Active counselors include any temporary counselors or other counselors trained to provide assistance on specific topics (e.g., Medicare prescription drug coverage). To be active, a counselor must be registered with SHIP and have signed a Confidentiality Agreement and some type of Counselor Agreement or Memorandum of Understanding (MOU) with the SHIP.

Process Overview

Under the Unique ID system, SHIP Directors approve and generate Unique IDs for SHIP counselors who have completed a confidentiality statement and who have been trained to be entrusted with private information related to the beneficiaries they counsel.





Unique ID Training and Paperwork

SHIP directors or their designees must provide you with Unique ID training, including training about maintaining the privacy of your Unique ID number. They must also have you sign a *Confidentiality Agreement for Receipt of Unique ID* before you can be assigned a Unique ID number.

Unique ID Creation in STARS

In STARS, users do not *request* Unique IDs. Instead, SHIP directors and SHIP assistant directors must tell STARS what team members should be *assigned* a Unique ID. The Unique ID number is automatically generated by the STARS system. CMS receives your Unique ID from ACL.

Receiving Your Unique ID Number

Depending upon your state or territory, you may receive your Unique ID Number directly from your supervisor, SHIP director, or SHIP director designee, or you may receive it in an automated email from the STARS system. Check with your supervisor to find out how your program is transmitting Unique IDs.

If your program has decided to use STARS to transmit Unique ID numbers, here is what you should look for:

- a. Sending address: DoNotReplyACLSystems@bah.com
- b. Subject line: CMS SHIP Unique ID Number
- c. Email body text:

“Welcome to STARS!

You've been registered as a user of the SHIP Tracking and Reporting System (STARS). Included below is your CMS SHIP Unique (1-800 Medicare) ID.

CMS SHIP Unique (1-800 Medicare) ID: [# will appear here in the email]

Effective Date: The U.S. Administration for Community Living (ACL) will send this number to the Centers for Medicare & Medicaid Services (CMS) on the last Thursday of this month. CMS then needs 7 – 10 days to process this number before it will be usable. Note: If this email is dated on or after the last Thursday of this month, your ID will be sent to CMS the last Thursday of next month.

If you have any questions about the ID, how to use your ID, or the effective date, please contact your administrator or refer to the CMS SHIP Unique ID Job Aid.

If you have any questions or have received this email in error, please contact your administrator or the Booz Allen STARS Help Desk.

Have a great day!”



Unique ID Effective Dates

ACL sends CMS an updated CMS SHIP Unique ID list on the last Thursday of every month. CMS needs seven to ten (7 – 10) days to process the monthly CMS SHIP Unique ID file. Unique IDs that are active in STARS before the last Thursday of the month will be usable within the first 7 - 10 days of the following month. Unique IDs approved on or after the last Thursday of the month will be usable the second month following their approval.



Inactivation of IDs follows the same schedule as newly activated IDs. Therefore, any CMS SHIP Unique IDs that have been inactivated will *not be* on the ACL-generated list sent to CMS. Consequently, they will *no longer be usable* after CMS processes the new list.

If your ID is inactivated in STARS within a month but is reactivated *before* the new monthly list is generated by ACL, there will be no interruption in your use of the CMS SHIP Unique ID.

120 Day Inactivity Rules

Your CMS SHIP Unique ID can become automatically inactivated based upon STARS system inactivity rules, regardless of whether or not you log into STARS.

Here are some overarching considerations and two charts about STARS inactivity functionality and consequences.

- *Types of inactivity that impact your Unique ID.* The Unique ID status is dependent upon counseling activity, as shown on the Beneficiary Contact and Beneficiary Additional Sessions forms. Your Unique ID will become inactive after 120 days with no counseling activity, even if you are conducting other SHIP work.
- *If you enter data directly into STARS* and the 120 Days of Inactivity Rules are met, your account becomes locked and you will not be able to log into STARS. You must contact the [Booz Allen STARS help desk](#) to have your account unlocked. Your Unique ID may or may not become inactivated.
- *If you do not enter data directly into STARS*, some of the system inactivity rules can still inactivate your Unique ID.
- See the two charts that follow for more details.



120 Days Without User Log In - Scenarios			
Scenario	Program Status field	Account Lockout	Unique ID Status
120 days lapse without user log in, and no records have been linked to the team member via <i>Session Conducted By</i> fields	Status is automatically set to <i>Inactive</i>	Account is automatically locked	Unique ID Status is automatically set to <i>Inactive</i>
120 days lapse without user log in, but Beneficiary Contact forms or Beneficiary Additional Sessions forms have been linked to the team member via <i>Session Conducted By</i> field	Status is not automatically set to <i>Inactive</i> (remains <i>Active</i>)	Account is automatically locked	Unique ID Status is not automatically set to <i>Inactive</i> (remains <i>Active</i>)
120 days lapse without user log in, but only Group Outreach, Media Outreach, Activity, or Additional Team Member forms have been linked to the team member via <i>Session Conducted By</i> fields	Status is not automatically set to <i>Inactive</i> (remains <i>Active</i>)	Account is automatically locked	Unique ID Status is automatically set to <i>Inactive</i>

120 Days <u>With</u> User Log In - Scenarios			
Scenario	Program Status field	Account Lockout	Unique ID Status
120 days with a successful user log in, but no records have been linked to the team member via <i>Session Conducted By</i> fields	Status is not automatically set to <i>Inactive</i> (remains <i>Active</i>)	Account is not automatically locked	Unique ID Status is automatically set to <i>Inactive</i>
120 days with a successful user log in, but only Beneficiary Contact forms or Beneficiary Additional Session Forms have been linked to the team member via <i>Session Conducted By</i> fields	Status is not automatically set to <i>Inactive</i> (remains <i>Active</i>)	Account is not automatically locked	Unique ID Status is not automatically set to <i>Inactive</i> (remains <i>Active</i>)
120 days with a successful user log in, but only Group Outreach, Media Outreach, Activity, or Additional Team Member forms have been linked to the team member via <i>Session Conducted By</i> fields	Status is not automatically set to <i>Inactive</i> (remains <i>Active</i>)	Account is not automatically locked	Unique ID Status is automatically set to <i>Inactive</i>



Unique ID User Instructions

When using the Unique ID to access beneficiary information from 1-800-Medicare, CMS has established a designated phone number for SHIPs: **1-888-647-6701**. When using the Unique ID to access beneficiary information from a Medicare Advantage or Part D plan, call the plan.

Reasons to Use Your Unique ID

Here are some examples of reasons counselors might use their Unique ID:

- Assisting beneficiaries with researching denied claims
- Researching possibly inaccurate information on Medicare Summary Notices (MSNs) or Explanations of Benefits (EOBs)
- Checking on premiums for Part C or Part D plans
- Checking on the status of the beneficiary's enrollment
- Checking on Durable Medical Equipment, Prosthetics, Orthotics, and Supplies (DMEPOS) Competitive Bidding information
- Assisting with a beneficiary's complex issues

Limitations to the Unique ID

There are some limitations to the Unique ID. It *cannot* provide:

- Access to advanced or specialized customer service representatives (CSRs). The 1-800-Medicare CSRs who answer calls made via the CMS SHIP Unique ID are the same CSRs who answer other calls to 1-800-Medicare.
- 1-800-Medicare CSRs will not be able to answer all questions about Medicare Advantage or Part D plans.
 - It is best to contact plans directly. Some do and some do not participate in the CMS SHIP Unique ID program. See the latest list in the SHIP Resource Library.

Calling Medicare with Your Unique ID

To use your CMS SHIP Unique ID with Medicare, call 1-888-647-6701, be ready to enter your Unique ID number, then select from the following menu options:

1. For general questions, press 1
2. For a hospital stay, press 2 (for a Part A agent)
3. For doctors services, press 3 (for a Part B agent)
4. For medical supplies, press 4 (for a DME agent)

Call 1-888-647-6701

Important: This SHIP dedicated phone number for calling Medicare is only for SHIP counselors is not to be shared with the general public.

Be ready to provide your Unique ID number to the Customer Service Representative (CSR) who answers and have pertinent beneficiary information ready. It will save time for you and the CSRs if you can provide the following:

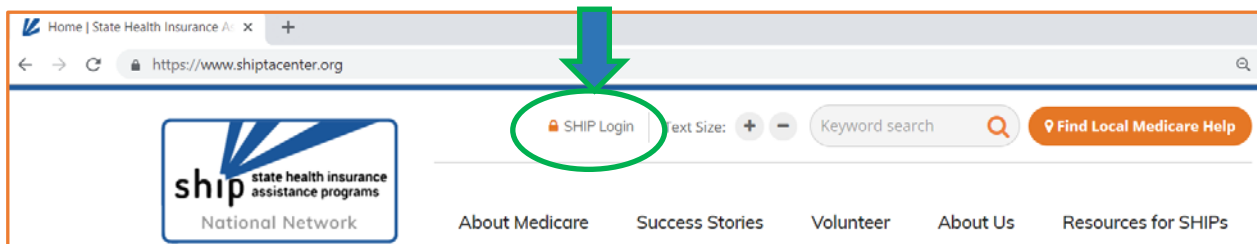


- Beneficiary name as it appears on the Medicare card
- Medicare number
- Medicare Part A and Part B effective dates
- Beneficiary date of birth
- Beneficiary address

Medicare CSRs will commonly ask you if there is a claim involved that has already been processed and/or whether you recognize the provider or supplier listed on the Medicare Summary Notice (MSN).

Unique ID Forms and Resources

CMS SHIP Unique ID resources are housed in the role-based, password-protected SHIP Resource Library at www.shiptacenter.org. Click the orange SHIP login padlock to log in. Go to the library and conduct a keyword search for “Unique ID.” (Note: If you do not have an account at www.shiptacenter.org, contact your supervisor for Unique ID resources.)



Examples of available Unique ID resources for counselors include:

- Counselor confidentiality agreement
- SHIP Unique ID resources for counselors
- CMS SHIP Unique ID job aid
- List of participating plans

Technical Assistance

- **Booz Allen Hamilton (a.k.a. “Booz Allen”):** For STARS technical assistance, such as for difficulties with usernames and passwords, contact the Booz Allen STARS help desk at boozallenstarshelpdesk@bah.com or 703-377-4424.
- **SHIP National Technical Assistance Center (SHIP TA Center):**
 - **STARS Support.** The SHIP TA Center provides webinar training, technical assistance, and written job aids on STARS. Contact the SHIP TA Center, stars@shiptacenter.org or 877-839-2675.
 - **Resource Library Support.** For assistance finding Unique ID forms and training resources in the password-protected area of the SHIP TA Center’s website, www.shiptacenter.org, contact them at 877-839-2675 or info@shiptacenter.org.