

PDP/MA-PD Cost Reporting

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Introduction

This job aid, created by the U.S. Administration for Community Living (ACL), is a reference guide to understanding and using the Prescription Drug Plan or Medicare Advantage with Prescription Drug coverage (PDP/MA-PD) cost fields on the STARS Beneficiary Contact Form (BCF). It should be used in conjunction with the Beneficiary Contact Form Job Aid. Cost change data should be reported in the Special Use Fields (SUFs) 1 and 2. Cost change verification should be attached to the Beneficiary Contact Form (BCF).

ACL conducted an evaluation of the SHIP program in 2015 which showed that SHIPs strongly desired a way to measure savings to Medicare beneficiaries. ACL conducted a pilot project with 11 SHIPs from June 2017-June 2018 which provided outcome-based cost change data as a direct result of SHIP services. The implementation of STARS offers ACL an opportunity to expand the collection of prescription drug cost data nationwide.

There are a number of reasons a beneficiary might enroll in a plan outside of cost considerations, like coverage or convenience. ACL collects cost change data on all PDP/MA-PD enrollments, including those that did not result in savings for the beneficiary.

Components of PDP/MA-PD Cost Data Collection

ACL uses STARS to collect data related to the cost changes as result of enrollment in PDP/MA-PD plans available through the Medicare Plan Finder (MPF). By collecting this data, SHIPs can demonstrate the impact of their work on behalf of beneficiaries in three ways:

1. Data on the number of beneficiaries who received PDP/MA-PD enrollment assistance from SHIPs;
2. Data on the average cost change per beneficiary who received PDP/MA-PD enrollment assistance from SHIPs;
3. Data on the reported total of PDP/MA-PD cost change for each state.

The cost data reported for PDP/MA-PD enrollment must be auditable for ACL to verify and share the numbers reported. Therefore, for SHIPs to accurately report this element, ACL requires supporting documentation when cost change data are reported. ACL and SHIPs will periodically review reported cost change data and remove it if it lacks required verification (remainder of form will be unchanged).

How to Report PDP/MA-PD Enrollment Data

Reporting PDP/MA-PD enrollment cost data on the Beneficiary Contact form in STARS consists of 4 steps:

1. Collect Plan Cost Information

2. Assist Beneficiary with Enrollment
3. Enter Data in STARS
4. Attach Verification

These steps are outlined in greater detail in coming pages.

Step 1: Collect Part D/MA-PD Cost Comparison Data

PDP/MA-PD enrollment assistance occurs when you actively assists a beneficiary with enrollment into a PDP/MA-PD, either online through the MPF or plan website, over the phone with a plan customer service representative or 1-800-Medicare, or with a paper application.

The first step in reporting this data is to gather the plan cost information from MPF <https://www.medicare.gov/find-a-plan/>.

Your Plan Comparison

My Current Profile Update Search

Zip Code: 19428
Current Coverage: Original Medicare, Aetna Medicare Rx Saver (PDP) (S5810-040-0)
Current Subsidy: No Extra Help [?]
Drug List ID: 4208158208
Password Date: 03/20/2018
Important Coverage Information

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Select the tabs below for more detailed information about the plan health benefits, drug costs and coverage and star ratings.

Symbols

N Nationwide Coverage

* Estimated

Overview

Health & Drug Plan Benefits

Drug Costs & Coverage

Star Ratings

Manage Drugs

Aetna Medicare Rx Saver (PDP)	Humana Walmart Rx Plan (PDP)	EnvisionRxPlus (PDP)
(S5810-040) Plan Type: PDP Organization: Aetna Medicare Members: 1-877-238-6211 711(TTY/TDD) Non Members: 1-855-338-7030 711(TTY/TDD) Coverage: Provides drug coverage only. NOTE: Health Plan Benefits are based on Original Medicare	(S5884-152) Plan Type: PDP Organization: Humana Insurance Company Members: 1-800-281-6918 711(TTY/TDD) Non Members: 1-800-706-0872 711(TTY/TDD) Coverage: Provides drug coverage only. NOTE: Health Plan Benefits are based on Original Medicare	(S7694-006) Plan Type: PDP Organization: EnvisionRx Plus Members: 1-866-250-2005 711(TTY/TDD) Non Members: 1-888-377-1439 711(TTY/TDD) Coverage: Provides drug coverage only. NOTE: Health Plan Benefits are based on Original Medicare
N	N Enroll	N Enroll

Fixed Costs

Estimate of What YOU Will Pay for Drug Plan Premium and Drug Costs

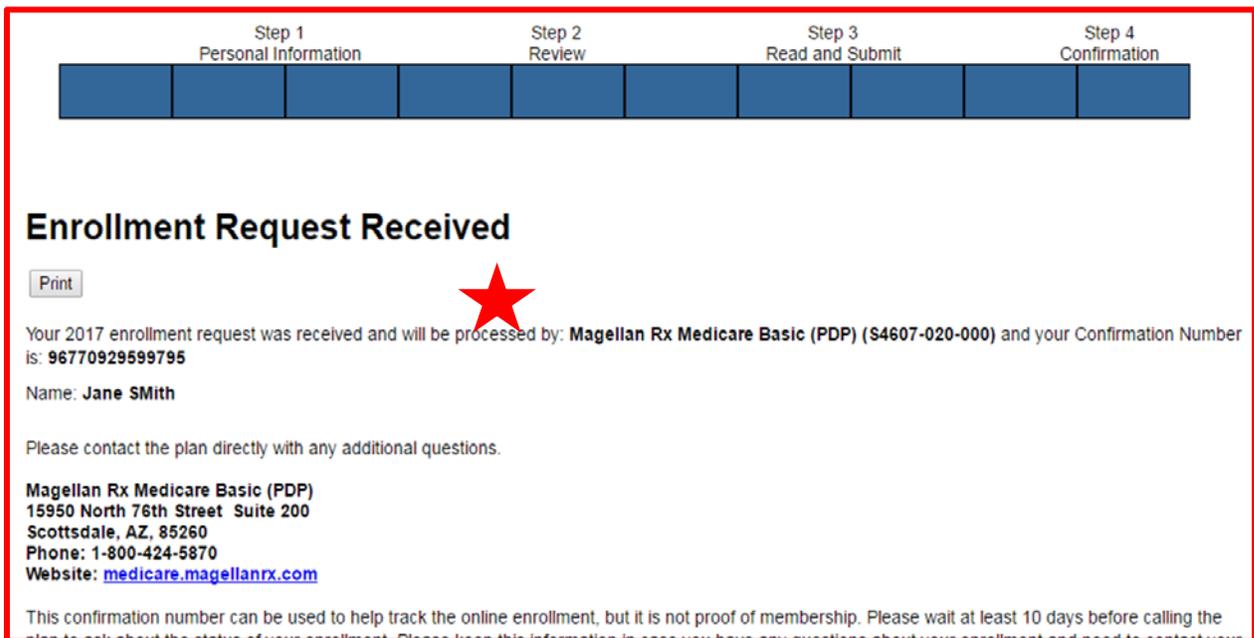
Cost at Giant Pharmacy		Cost at Giant Pharmacy		Cost at CVS Pharmacy	
Enrollment Today [?]	\$445.50 ←	Enrollment Today [?]	\$250.20	Enrollment Today [?]	\$131.40
Cost at CVS Pharmacy		Cost at CVS Pharmacy		Cost at Giant Pharmacy	
Enrollment Today [?]	\$355.50	Enrollment Today [?]	\$300.60	Enrollment Today [?]	\$131.40 ←

The plan comparison page of the MPF appears above. In this example, the beneficiary is currently enrolled in the Aetna Medicare Rx Saver plan. The estimated annual costs of the Aetna PDP are \$445.50 using the Giant pharmacy (beneficiary’s desired pharmacy). After comparison assistance with the SHIP team member, the beneficiary chooses to enroll in the Envision Rx PDP with estimated annual costs of \$131.40 at the Giant pharmacy. Be sure to capture this page for verification of cost data (see the appendix for hints on capturing and saving MPF information).

There are multiple ways to view cost data on MPF, any view in which both the original and new cost of the plans are visible are acceptable for verification. For instance, individual cost pages for each plan are acceptable. Be sure to include pages for both the new and original plan costs. Save the verification as a document so that you can access it later and attach it to the BCF.

Step 2: Assist Beneficiary with Enrollment

After you assist with enrolling the beneficiary in the new plan, save the MPF Enrollment Request Received page and attach it to the BCF (see the appendix for hints on capturing and saving MPF information). This is the other component required for verification of the cost data to be attached to the BCF.



Step 3: Enter Enrollment Data in STARS

Check the “Enrollment” Topic Discussed box in either Medicare Part D or Medicare Advantage (MA and MA-PD) to report enrollment assistance (pictured below). Remember to select additional topics discussed as applicable, often multiple topics are discussed in one counseling session.

Topics Discussed
 At least one Topic Discussed selection is required. Please choose a Topic before continuing.

Medicare Part D	<input type="checkbox"/> Appeals/Grievances <input type="checkbox"/> Benefit Explanation <input type="checkbox"/> Claims/Billing <input type="checkbox"/> Disenrollment <input type="checkbox"/> Eligibility/Screening <input checked="" type="checkbox"/> Enrollment <input type="checkbox"/> Fraud and Abuse	Medicare Advantage (MA and MA-PD)	<input type="checkbox"/> Appeals/Grievances <input type="checkbox"/> Benefit Explanation <input type="checkbox"/> Claims/Billing <input type="checkbox"/> Disenrollment <input type="checkbox"/> Eligibility/Screening <input checked="" type="checkbox"/> Enrollment <input type="checkbox"/> Fraud and Abuse
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Then, record the plan costs in the Special Use Fields toward the bottom of the BCF. Obtain the estimated annual cost (this includes the premium *plus* drug costs) of the plan from the plan comparison page of the MPF.

In the earlier example, the beneficiary had an **original** plan cost of \$445.50, and a **new** plan cost of \$131.40 at the preferred pharmacy.

Special Use Fields Original PDP/MA-PD Cost	445.50
New PDP/MA-PD Cost	131.40

Note: There is no field to report the cost change amount in STARS. This calculation will be performed based on exporting these fields through a Search in STARS and then applying a formula.

Step 4: Attach Verification

To verify the PDP/MA-PD cost data reported on the BCF, you must attach the comparison page(s) and the Enrollment Request Received page from MPF. Each BCF has the capacity to accept 5 attachments, located toward the bottom of the BCF. The following file types are accepted in STARS: doc/docx; ppt/pptx; xls/xlsx; pdf; rtf. The limit on file size attachments in STARS is 500MB per file. Use two of these attachments for the MPF pages listed in Steps 1 and 2 above.

Attach File	<input style="width: 100%; height: 30px;" type="text"/>	<input type="button" value="Browse"/>
Attach File	<input style="width: 100%; height: 30px;" type="text"/>	<input type="button" value="Browse"/>

FAQs about Reporting PDP/MA-PD Cost Data

Question: How should I report when a beneficiary is new to Medicare or the beneficiary's plan is no longer available (for example, there is a plan termination or the beneficiary moves to new service area)?

Answer: Regardless of the previous coverage (or lack of coverage), report the estimated annual drug costs associated with Original Medicare in the "Original PDP/MA-PD Cost" field, and report estimated annual drug costs of the new plan in the "New PDP/MA-PD Cost" field of the BCF.

Question: How should I report when a beneficiary is automatically enrolled (also known as facilitated enrollment) into a plan ("Plan A"), but the SHIP assists the client in enrolling in a different plan ("Plan B")?

Answer: Report the Estimated Annual Drug Costs for Plan A in the "Original PDP/MA-PD Cost" field, and report the Estimated Annual Drug Costs for Plan B in the "New PDP/MA-PD Cost" field.

Question: Should I report when a SHIP helps enroll a client in a new PDP/MA-PD plan, but the client doesn't experience savings, or pays more for the new PDP/MA-PD plan?

Answer: Yes, report the data. There are a number of reasons a beneficiary might select a higher cost plan. ACL collects cost change data on all PDP/MA-PD enrollments, including those that did not result in savings for the beneficiary.

Question: What should be reported if I provide a beneficiary assistance with PDP/MA-PD comparison, but does not help enroll the beneficiary in a different PDP/MA-PD?

Answer: Do not report any data in the Original or New PDP/MA-PD cost fields. ACL collects cost change data only on instances where the SHIP actively assisted the beneficiary in enrollment.

Question: What should be reported if I provide a beneficiary with Part D savings by assisting the beneficiary in switching to another pharmacy, but the beneficiary does not change plans?

Answer: Do not report any data in the Original or New PDP/MA-PD cost fields. ACL collects cost change data only on instances where the SHIP assisted the beneficiary in enrollment, and no enrollment took place in this instance.

Question: What should be reported if I provide a beneficiary with Extra Help/LIS application assistance?

Answer: Do not report any data in the Original or New PDP/MA-PD cost fields because no PDP/MA-PD enrollment occurred.

Question: What should be reported if I help a beneficiary locate and enroll in a pharmaceutical assistance program or other form of non-Part D prescription assistance?

Answer: Even though this assistance can save the beneficiary a great deal of money, it should not be reported because no PDP/MA-PD enrollment took place.

Question: What should be reported if I help a beneficiary with an enrollment for the current year and a future year during a counseling session (may occur during Open Enrollment Period)?

Answer: Sum the cost changes for each plan and report on the same BCF. Because the contact occurs on the same day with the same counselor as part of the same session, these should be reported together. Be sure to attach documentation for each plan's application and costs to the BCF for verification.

Question: Where should cost change verification be attached if the enrollment assistance occurs on a subsequent visit and is reported as an Additional Beneficiary Session (ABS)? At present ABSs do not have SUFs or attachment capability.

Answer: Attach the verification documents and enter the cost change data on the initial BCF. ACL is working with Booz Allen Hamilton to add these through an enhancement to the ABS tab.

Question: What happens if no cost change verification attachments are on the BCF and there are cost amounts in the Special Use Fields?

Answer: Verification documents are a requirement. ACL and SHIPs will periodically review reported cost change data in the SUFs and removed it if it lacks required verification (remainder of form will be unchanged).

Question: Will we be able to pull a report showing the amount of money our SHIP Counselors saved beneficiaries during open enrollment?

Answer: You can use the Search menu to find that information. There isn't a report in the report menu at this time.

Question: If we conduct a plan finder comparison for someone, but they decide to enroll later, such as through 1-800-Medicare, can we enter the cost information?

Answer: No. You can only enter cost information if you help them enroll, not if they decide to enroll on their own at a later date or with help from another source, such as 1-800-Medicare.

Question: Will ACL accept cost verification pages with beneficiary names blacked out?

Answer: Yes, it is acceptable to black out the beneficiary name so long as the plan name is legible. Also, the beneficiary name is not a required field in STARS. You would be able to omit the beneficiary identity, if desired, by leaving both the name field blank and blocking out the name on any enrollment verification documentation you upload.

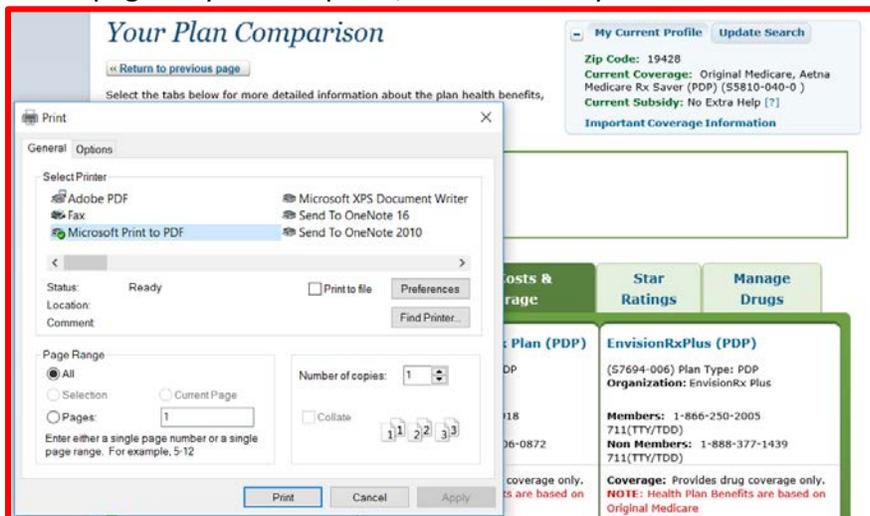
Tips for Capturing Medicare Plan Finder Data

Plan Finder Print options

At the top of each page of the Plan Finder, there is an option to Print the page.



After you select “Print”, you will be taken to a new window and the print options will appear. If “Print to PDF” is an option and is selected, you will be able to save a PDF version of the Plan Finder page on your computer, and then easily attach it to the BCF.



Screenshots:

A screenshot is a picture of the images or data displayed on your computer. SHIPs may use screenshots of the Medicare Plan Finder Plan Comparison page and Enrollment Confirmation page to verify their PDP/MA-PD cost data. See below for tips on how to take screenshots on your computer.

Print Screen

To capture a picture of your computer's entire screen, press the "Ctrl" button and hold it down at the same time press the "PrtScn" button. This key will take a picture of your screen, but it will not save it anywhere. The image is now copied to your computer's clipboard. Open a Word document and paste the image into the document. Save the document and attach it into the STARS Beneficiary Contact form.

Snipping Tool

Many Windows' computers come with a built-in screenshot tool, called the Snipping Tool. You can access it by going to the Start menu > All Programs > Windows Accessories > Snipping Tool.

To use the Snipping tool, open it and click New. A cursor will appear. Drag the cursor around the area of the screen that you want to capture. When you let go of the cursor, the image that you chose will appear in a new window. The image is not yet saved. To save, click the "Save As" button and save the image as a .jpeg or .png file type. Attach the image into the STARS Beneficiary Contact form.

Security Reminder

If you're saving Medicare Plan Finder data on a public computer, reference the STARS Security Slick Sheet for tips on how to delete files. Alternatively, use a password protected USB (thumb) drive handy and save them there to attach to BCFs later.

Conclusion

This and other STARS support materials from the SHIP National Technical Assistance Center (SHIP TA Center) are linked on the STARS landing page at <https://stars.acl.gov>. STARS is the nationwide, web-based SHIP data system that facilitates the reporting of SHIP activities. STARS was developed and is owned by the U.S. Administration for Community Living (ACL), Office of Healthcare Information and Counseling (OHIC), which oversees and manages the SHIP program nationally. These instructions assume that you already know the basics about accessing STARS.

Technical Assistance

- Go to STARS: <https://stars.acl.gov>. See "Need Help with STARS?"
- For difficulties with usernames and passwords, contact the STARS help desk at Booz Allen Hamilton, boozallenstarshelpdesk@bah.com or 703-377-4424
- For questions about these steps or other STARS support resources, contact the SHIP TA Center, stars@shiptacenter.org or 877-839-2675.

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