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| **BENEFICIARY CONTACT FORM** | | | | | | | | | | | | | | | | | | | | | | | | |
| **\* Items marked with asterisk (\*) indicate required fields** | | | | | | | | | | | | | | | | | | | | | | | | |
| **MIPPA Contact \*:** | | | * Yes | | | * No | | | | | | | | | | | | | | | | | | |
| **Send to SMP:** | | | * Yes | | | * No | | **SIRS eFile ID:**  **(\*required if sending record to SMP)** | | | | | | | | | |  | | | | | | |
| **Counselor Information \*** | | | | | | | | | | | | | | | | | | | | | | | | |
| Session Conducted By**\*** : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Partner Organization Affiliation**\*** : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | ZIP Code of Session Location **\*** : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | | State of Session Location **\*** : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | |
| County of Session Location **\*** :  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | | | | | | | |
| **Beneficiary & Representative Name and Contact Information** | | | | | | | | | | | | | | | | | | | | | | | | |
| Beneficiary First Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Beneficiary Last Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Beneficiary Phone: ( \_\_\_\_\_\_ ) -\_\_\_\_\_\_\_\_\_\_ -\_\_\_\_\_\_\_\_\_\_\_\_  Beneficiary Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | | Representative First Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Representative Last Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Representative Phone: ( \_\_\_\_\_\_ ) -\_\_\_\_\_\_\_\_\_\_ -\_\_\_\_\_\_\_\_\_\_\_\_  Representative Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | | | | | | |
| **Beneficiary Residence \*** | | | | | | | | | | | | | | | | | | | | | | | | |
| State of Bene Res. **\*** : \_\_\_\_\_\_\_\_ | | | | | | Zip Code of Bene Res. **\*** : \_\_\_\_\_\_\_\_ | | | | | | | | County of Bene Res. **\*** : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | | |
| Date of Contact \*: | | | | | | | | | | |  | | | | | | | | | | | | | |
| **How Did Beneficiary Learn About SHIP \* (select only one):** | | | | | | | | | | | | | | | | | | | | | | | | |
| * CMS Outreach * Congressional Office * Friend or Relative * Health/Drug Plan * Partner Agency | | | | | * Previous Contact * SHIP Mailings * SHIP Media * SHIP Presentation * State SHIP Website | | | | | | * SHIP TA Center * SSA * State Medicaid Agency * 1-800 Medicare | | | | | | | | * Other * Not Collected | | | | | |
| **Method of Contact \* (select only one):** | | | | | | | | | | | | | **Beneficiary Age Group \***  **(select only one):** | | | | | | | | **Beneficiary Gender \***  **(select only one):** | | | |
| * Phone Call * Email * Web-based * Postal Mail or Fax | | * Face to Face at Session Location/ Event Site | | | | | * Face to Face at Bene Home/ Facility | | | | | | * 64 or Younger * 65 – 74 * 75 – 84 | | | | * 85 or Older * Not Collected | | | | * Female * Male * Other * Not Collected | | | |
| **Beneficiary Race \* (multiple selections allowed):** | | | | | | | | | | | | | **Beneficiary Language \*:** | | | | | | | | | | | |
| * American Indian or Alaska Native * Asian * Black or African American * Hispanic or Latino | | | | | | * Native Hawaiian or Other Pacific Islander * White * Other * Not Collected | | | | | | | English is Beneficiary’s Primary Language | | | | | | | | | | * Yes | * No |
| **Receiving or Applying for Social Security Disability or Medicare Disability \* (select only one):** | | | | | | | | | | | |
| * Yes | | | | | * No | | | | | | |
| **Beneficiary Monthly Income \* (select only one):** | | | | | | | | | | | | | **Beneficiary Assets \* (select only one):** | | | | | | | | | | | |
| * Below 150% FPL * At or Above 150% FPL | | | | * Not Collected | | | | | | | | | * Below LIS Asset Limits * Above LIS Asset Limits | | | | | | | | | * Not Collected | | |
| **Topics Discussed \* (At least one Topic Discussed selection is required. Multiple selections allowed)** | | | | | | | | | | | | | | | | | | | | | | | | |
| **Original**  **Medicare**  **(Parts A & B)** | * Appeals/Grievances * Benefit Explanation * Claims/Billing * Coordination of Benefits * Eligibility * Enrollment/Disenrollment * Fraud and Abuse * QIO/Quality of Care | | | | | | | | | | | **Medigap and Medicare Select** | | | | * Benefit Explanation * Claims/Billing * Eligibility/Screening * Fraud and Abuse * Marketing/Sales Complaints & Issues * Plan Non-Renewal * Plans Comparison | | | | | | | | |
| **Topics Discussed (multiple selections allowed) (continued from p.1)\*** | | | | | | | | | | | | | | | | | | | | | | | | |
| **Medicare Advantage (MA and MA-PD)**   * Appeals/Grievances * Benefit Explanation * Claims/Billing * Disenrollment * Eligibility/Screening * Enrollment * Fraud and Abuse * Marketing/Sales Complaints & Issues * Plan Non-Renewal * Plans Comparison * QIO/Quality of Care   **Medicare Part D**   * Appeals/Grievances * Benefit Explanation * Claims/Billing * Disenrollment * Eligibility/Screening * Enrollment * Fraud and Abuse * Marketing/Sales Complaints & Issues * Plan Non-Renewal * Plans Comparison   **Part D Low Income Subsidy (LIS/Extra Help)**   * Appeals/Grievances * Application Assistance * Application Submission * Benefit Explanation * Claims/Billing * Eligibility/Screening * LI NET/BAE   **Other Prescription Assistance**   * Manufacturer Programs * Military Drug Benefits * State Pharmaceutical Assistance Programs * Union/Employer Plan * Other | | | | | | | | | | | | | | **Medicaid**   * Application Submission * Benefit Explanation * Claims/Billing * Eligibility/Screening * Fraud and Abuse * Medicaid Application Assistance * Medicare Buy-in Coordination * Medicaid Managed Care * MSP Application Assistance * Recertification * Other   **Other Insurance**   * Active Employer Health Benefits * COBRA * Indian Health Services * Long Term Care (LTC) Insurance * LTC Partnership * Other Health Insurance * Retiree Employer Health Benefits * Tricare For Life Health Benefits * Tricare Health Benefits * VA/Veterans Health Benefits * Other   **Additional Topic Details**   * Ambulance * Dental/Vision/Hearing * DMEPOS * Duals Demonstration * Home Health Care * Hospice * Hospital * New Medicare Card * New to Medicare * Preventive Benefits * Skilled Nursing Facility | | | | | | | | | | |
| **Total Time Spent on This Contact \*** | | | | | | | | | | | | | | | **Status \*** | | | | | | | | | |
| \_\_\_\_ Hours \_\_\_\_\_\_\_ Minutes | | | | | | | | | | | | | | | * In Progress | | | | | * Completed | | | | |
| **Special Use Fields** | | | | | | | | | | | | | | | | | | | | | | | | |
| Original PDP/MA-PD Cost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  New PDP/MA-PD Cost: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | | | | | | | Field 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Field 4: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Field 5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | | |
| **Notes** | | | | | | | | | | | | | | | | | | | | | | | | |
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