# Compass MED D - SHIP Counselor Calls For CVS Caremark Part D Plans

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#### Description: This document provides guidance on addressing calls from SHIP Counselors.

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| Overview |

The MED D Customer Care Representative (CCR) may receive a call from a State Health Insurance Assistance Program (SHIP) counselor who is requesting assistance in aiding a MED D beneficiary.

The SHIP is a national program funded by CMS that offers free one-on-one counseling and assistance via telephone or face-to-face interactive sessions to people with Medicare and their families.

CMS has developed a Unique ID system when a SHIP counselor calls on behalf of the beneficiary; the SHIP counselor will need to present their unique ID.

* When this Unique ID is presented, the CCR may provide **all** information as if speaking to the beneficiary.
  + This includes checking on the status of a coverage determination or appeal.
  + For cases requiring special processing, refer to the [Unique Process Scenarios for SHIP Counselors](#_Process_Scenarios_for) section of this work instruction.
* Authentication of the beneficiary’s information is required as standard practice.

The steps below are designed to walk the CCR through the process of working with a SHIP counselor on behalf of the beneficiary.

In accordance with CMS guidance which strongly encourages MED D plans to implement a process whereby SHIP counselors can act on behalf of the beneficiary, this document provides guidance to the CCR for receiving calls from a SHIP counselor.

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| CCR Steps to Authenticate SHIP Counselors |

When receiving a call from a SHIP counselor, the CCR will:

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| **Step** | **Action** | |
| **1** | Greet the caller.  **Result:** Once the call is transferred via the CTI, the **Caller Information** screen automatically displays.    **Notes:**   * If the Caller Information screen did not populate, refer to the [Compass - Member Search](C:\\Users\\C337799\\Downloads\\TSRC-PROD-050037). * At times, for IVR authenticated calls, client specific scripting may display in the greeting; read the client specific greeting verbatim when they appear. | |
| **2** | Determine the reason for the call, then select the appropriate option in the **Is this call a Warm Transfer?** field. | |
| **If…** | **Then…** |
| Not a warm transfer | * Select **No**. * Proceed to the next step. |
| A warm transfer | * Select **Yes**. * Complete the additional fields. * Proceed to the next step. |
| **3** | Ask the SHIP counselor to provide their unique SHIP ID number.  **Note:** The format is a 7-digit number. | |
| **If…** | **Then…** |
| The SHIP counselor is able to provide their unique SHIP ID number | Enter the **Caller Information** in Compass as follows:   * **Caller Name:** (SHIP counselor’s Full Name) * **Who is Calling?** (Select **SHIP Counselor** from the drop-down menu) * **Unique ID:** Enter the SHIP ID number provided by the SHIP counselor, * **State Program Name:** Name of the SHIP Program * Click **NEXT.**   Proceed to Step 4. |
| The SHIP counselor provides a unique ID, but it is not located within **Compass** | If caller cannot provide a Unique ID and confirm the associated state, advise them to contact their state director, and change **Who is Calling** selection to "Family Member/3rd Party" to continue.  Enter the **Caller Information** in Compass as follows:   * **Caller Name:**  (SHIP counselor’s Full Name) * **Who is Calling?** (Select **Family Member/Third Party** from the drop-down menu) * Click **NEXT.**   Refer to the **Non-Member or Third Party** section of the [HIPAA Authentication Grid](file:///C:\Users\C337799\Downloads\CMS-2-028920).   * If the SHIP counselor is able to satisfy requirements described in the work instruction, CCR may proceed with the call. Only provide information as you would for an authorized third party per the HIPAA Authentication Grid. * In this circumstance, the SHIP counselor is unable to file a grievance without an AOR document.   **Note:** If SHIP counselor states that they have provided their correct unique ID and you are not able to validate the ID in Compass, refer to the [Process Scenarios for SHIP Counselors Who Provide a Unique ID](#_Participant_Requests_a) section below.  Proceed to Step 4. |
| The SHIP counselor cannot provide a unique ID, and the beneficiary is on the line | Ask to speak with the beneficiary authenticate the account and obtain a verbal authorization to speak to the SHIP counselor. CCR may proceed with the call.  Enter the **Caller Information** in Compass as follows:   * **Caller Name:** (Beneficiary’s Full Name) * **Who is Calling?** (Select **Member/Self** from the drop-down menu) * Click **NEXT.**   Refer to the **Member or Legal Representative** section of the [HIPAA Authentication Grid](file:///C:\Users\C337799\Downloads\CMS-2-028920).  Proceed to Step 4. |
| The SHIP counselor cannot provide a unique ID, and the beneficiary is NOT on the line | If caller cannot provide a Unique ID and confirm the associated state, advise them to contact their state director, and change **Who is Calling** selection to "Family Member/3rd Party" to continue.  Enter the **Caller Information** in Compass as follows:   * **Caller Name:** (SHIP counselor’s Full Name) * **Who is Calling?** (Select **Family Member/Third Party** from the drop-down menu) * Click **NEXT.**   Refer to the **Non-Member or Third Party** section of the [HIPAA Authentication Grid](file:///C:\Users\C337799\Downloads\CMS-2-028920).   * If the SHIP counselor is able to satisfy requirements described in the work instruction, CCR may proceed with the call. Only provide information as you would for an authorized third party per the HIPAA Authentication Grid. * In this circumstance, the SHIP counselor is unable to file a grievance without an AOR document.   Proceed to Step 4. |
| **4** | Authenticate the beneficiary’s information with the SHIP counselor.  Refer to the following documents:   * [Compass - Guided Caller Authentication](C:\\Users\\C337799\\Downloads\\TSRC-PROD-050163) * [HIPAA Authentication Grid](file:///C:\Users\C337799\Downloads\CMS-2-028920) | |
| **5** | Assist the SHIP counselor with their questions on behalf of the beneficiary. | |
| **6** | Document and close the call according to current policies and procedures.   * Refer to [Compass - Call Documentation](C:\\Users\\C337799\\Downloads\\TSRC-PROD-050011) and [Compass MED D - Call Documentation Job Aid](file:///C:\Users\C337799\Downloads\TSRC-PROD-061758).   **Note:** Documentation should state **Spoke to SHIP Counselor (Name) on behalf of the beneficiary.** | |

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| Process Scenarios for SHIP Counselors Who Provide a Unique ID |

Use the appropriate scenario below:

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| **If a SHIP Counselor…** | **Then…** | |
| SHIP counselor states that they have provided their correct unique ID and you are not able to validate the ID in Compass | Refer to the [Medicare and Medicaid SHIP Counselor Unique ID List](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fadccc80-a0a1-449b-b5b0-056705aad9ec).  If you can confirm the unique ID on the Medicare and Medicaid SHIP Counselor Unique ID list than enter the **Caller Information** in Compass as follows:   * **Caller Name:** (SHIP counselor’s Full Name) * **Who is Calling?** (Select **Member/Self** from the drop-down menu) * Click **NEXT.** * **Document** the SHIP counselor’s name and unique ID in the case comments. | |
| Wants to file a grievance or coverage determination on behalf of the beneficiary | Begin the grievance process because the SHIP counselor can file a grievance on behalf of the beneficiary. The ‘Filed By’ button in MedHOK should be ‘Beneficiary’. If the SHIP Counselor wants to be contacted with the resolution of the CD or grievance, then an AOR form must be completed prior to filing.  Refer to the following:   * + [Compass MED D - Coverage Determinations and Redeterminations (Appeals)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=a23bc09d-37f7-4105-ba57-d4e9d7f512ff)   + Submit a grievance in Compass by navigating to the Quick Actions panel and selecting **Submit Grievance**. Refer to [Compass MED D - How to File a Grievance in Compass](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1bfd5ce-4c26-4dbb-a851-188f548bdf81). | |
| Wants to enroll a beneficiary | Perform the following: | |
| **If...** | **Then...** |
| SilverScript | Advise the SHIP Counselor an enrollment application can be completed by:   * Visiting [www.aetnamedicare.com](http://www.aetnamedicare.com). * Calling 1-800-MEDICARE (633-4227) 24 hours a day, 7 days a week or visit medicare.gov to enroll. TTY users should call 1-877-486-2048. * Speaking with an Enrollment Agent   + If SHIP Counselor would like to speak with an Enrollment Agent, transfer to an Enrollment Agent. Refer to [MED D - Guide to Transferring a Call](file:///C:\Users\C337799\Downloads\TSRC-PROD-029866).   **Note:** Leave comments to indicate what actions were taken and any pertinent information (mandatory) |
| BlueMedicareRx | * Transfer the SHIP Counselor to an enrollment trained representative, or if you are trained to take an enrollment, proceed to assist the SHIP counselor to enroll the beneficiary in his or her new region. Refer to [Compass MED D - Blue MedicareRx (NEJE) - Enrollment Portal](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=da34f1cb-7925-4d56-8a30-5fc0738b4edd). * Leave comments to indicate what actions were taken and any pertinent information (mandatory).   **Note:** Leave comments to indicate what actions were taken and any pertinent information (mandatory). |
| Wants to disenroll a beneficiary | Warm Transfer to the Care Specialized Member Services Team (SMST).  Refer to [MED D - Guide to Transferring a Call](file:///C:\Users\C337799\Downloads\TSRC-PROD-029866). | |
| Wants to update a beneficiary’s address and/or prevent disenrollment due to OOA | If the Ship Counselor provides their unique ID, the Ship Counselor can update the address on the beneficiary’s behalf.  Refer to [Compass MED D - Address Changes and Out of Area (OOA)](file:///C:\Users\C337799\Downloads\TSRC-PROD-061760). | |
| Has a prospective enrollee on the phone and has general questions about the SilverScript plan | Assist via [www.aetnamedicare.com](http://www.aetnamedicare.com). | |
| Message (Med D SHIP Counselor) does not appear on the phone display when speaking to a SHIP counselor | Remind the SHIP counselor to call the direct toll-free number in the future at **866-490-2098.** | |

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| Related Documents |

Grievance Standard Verbiage (for use in Discussion with Beneficiary) section in [MED D - Grievances Index](file:///C:\Users\C337799\Downloads\TSRC-PROD-007931)

**Parent SOP:** CALL-0048: [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

**Abbreviations/Definitions:** [Abbreviations / Definitions](file:///C:\Users\C337799\Downloads\CMS-2-017428)

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