**MED D - Retroactive Loss of Low-Income Subsidy (LIS) Population - SilverScript**

[Call Handling](#_Toc155099908)

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**Description:** MED D beneficiaries were previously sent letters regarding retroactive changes to certain period(s) when they may not qualify for Extra Help (Low Income Subsidy).CMS has completed their review of these prior changes. CMS sent a notice on the week of April 8, 2024, informing certain beneficiaries that their LIS period will end on **April 30, 2024**.

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| Call Handling |

Follow the steps below:

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| **Step** | **Action** | | |
| **1** | In the **PeopleSafe - Medicare D tab**, review the **View Comments** for the following note to determine if the beneficiary is a part of the impacted population:      “Member was part of CMS LIS Removal in Nov 2023. Applicable billing processes will be resuming per CMS guidance and balances have been updated.”  **Note:** DO NOT proceed with this document if the beneficiary does not have this note on their account. | | |
| **2** | Assist the beneficiary with any questions they have regarding premium billing: | | |
| **If...** | **Then…** | |
| Beneficiary is requesting an invoice or Premium Statement | There may be some updates in process in regard to your current Med D premium balance. I will be happy to send a request for you that will be researched by the appropriate department.  Submit the following RM Task:  **Task Category:**  Billing/Payment  **Task Type:** Premium Billing Inquiry Medicare D  **Queue:**  Finance - Scottsdale Premium Billing  **Reason For Dispute:**  STATEMENT REQUEST  **Task Notes:** Document the following:   * **AST017**, Beneficiary requests statement for <**list reason(s), detail exactly** what the beneficiary is disputing> & <**specify dates in question**>. | |
| Beneficiary has questions about premium balance | Review the letters in ONEclick as well as balance and billing history in the Med D tab of PeopleSafe.  Your current balance is $XX.XX. This includes your monthly premium through <Month 2024>. | |
| Beneficiary has a credit balance and is requesting a refund | I will be happy to send a request for you that will be researched by the appropriate department. If a refund is due, you should receive your refund check within 21 business days.  Submit the following RM Task:  **Task Category:**Billing/Payment  **Task Type:**Premium Billing Inquiry Medicare D  **Queue:**Finance - Scottsdale Premium Billing  **Amount Disputed:**  <Enter the amount requested for refund>  **Reason for Dispute:**REFUND REQUEST/STATUS  **Task Notes:**  Document the following:   * **REF014**, LIS Removal Impact population. The member is requesting a refund of the retroactive premiums. | |
| Beneficiary is requesting a payment plan for retro amount | I will be happy to send a request for you that will be researched by the appropriate department.  Submit the following RM Task:  **Task Category:**  Billing/Payment  **Task Type:**  Premium Billing Inquiry Medicare D  **Queue: Finance -** Scottsdale Premium Billing  **Reason for Dispute:** PAYMENT PLAN  **Task Notes:** Document the following:   * **PPS011**, LIS Removal Impact Population. The beneficiary has agreed to a Payment Plan. The beneficiary has agreed to pay <$XX.XX>in addition to the monthly premium <$XX.XX>, for a total of <$XX.XX>. * Beneficiary’s contact number. | |
| Beneficiary has an SSA or RRB Stock ID and had retro amount deducted from SSA or RRB | Review the Medicare D Inquiry Comments to confirm if the below note is on the beneficiary’s account:  “Member may have an SSA deduction or recoupment owed due to CMS memo guidance related to recent LIS changes.” | |
| **If...** | **Then…** |
| Yes | Beneficiaries may call in stating that they had a lump sum premium deducted from their SSA or RRB benefits. The plan was previously notified that the beneficiary may not qualify for Extra Help for a period of time. Due to this change, SSA or RRB may have deducted retro premiums from the beneficiaries SSA or RRB benefit. These previous LIS changes have been reviewed by CMS.  We previously received notification that you may not qualify for Extra Help for a period of time. Due to this, we received a payment from <SSA or RRB> with retroactive premiums. CMS has reviewed the changes. At this time, the plan is waiting for adjustments if applicable. |
| No | Beneficiaries may call in stating that they had a lump sum premium deducted from their SSA or RRB benefits. The plan was previously notified that the beneficiary may not qualify for Extra Help for a period of time. Due to this change, SSA or RRB may have deducted retro premiums from the beneficiaries SSA or RRB benefit. These previous LIS changes have been reviewed by CMS.  We previously received notification that you may not qualify for Extra Help for a period of time. Due to this change, <SSA or RRB> may have deducted retro premiums from your <SSA or RRB> benefit. CMS has reviewed the changes. At this time, the plan is waiting for adjustments, if applicable. |
| Beneficiary has questions about their SSA as it relates to retroactive premiums | Submit the following RM Task:  **Task Category:**Billing/Payment  **Task Type:**Premium Billing Inquiry Medicare D  **Queue:**Finance - Scottsdale Premium Billing  **Reason for Dispute:**  SSA RESEARCH  **Amount Disputed:**$0.00  **Task Notes:** Document the following:   * **SSR015, SSA RESEARCH -** LIS removal impact population. The beneficiary is requesting information regarding SSA Deductions for retroactive premiums related to LIS removal. | |
| **3** | Advise the beneficiary they should reapply for Extra Help to SSA or contact their State Medical Assistance (Medicaid) office for more information about assistance with their prescription drug costs.  We encourage you to contact the Social Security Administration to reapply for Extra Help at this time or for any additional questions you may have.  **Social Security Administration**  **1-800-772-1213, 8 a.m. to 7 p.m. Local Time, Monday-Friday**  TTY users call:  **1-800-325-0778**  To reapply for Extra Help, refer to <https://www.ssa.gov/medicare/part-d-extra-help> | | |

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| **Log Activity** |

**1331 -** CMS LIS 2024 ISSUE

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| Related Documents |

[MED D - Low Income Subsidy (LIS) Informational Overview](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=39c4d667-eb19-4bde-9ec0-bdcda34aa0dd)

[MED D - When to Refer to Social Security (SSA) and Medicare (CMS)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c9e294cd-93c4-466f-a6d8-e850070eda25)

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