LIS Reminder sheet: Applying and Documenting

"We are trying to make information available to everyone about available benefits "

1. Have your client self-screen, or use screening tool.

2. Apply:
   - go to www.benefitscheckup.org/oregon
   - answer questions, complete the application, review for accuracy
   - click "Submit Your Application"
   - at the "Congratulations" page, click "View your Submission Receipt"
   - click "Print this Page Now for your Records"
   - make a copy for the client to keep for his/her records

3. Collect data:
   ****Need client’s full name, spelled exactly like it was on the Social Security or Medicare Card, and the birthdate.

   Best practice: Print the first page of the Submission Receipt with client information and fax to Donna Delikat at State SHIBA, 1-503-947-7092

   Still acceptable:
   - Call the State SHIBA line (1-800-722-4134) and leave a message for Donna Delikat with your name and County and this info.
   - or, Call your SHIBA Coordinator with this info.
   - or, Collect info on a tracking sheet provided by your Coordinator, and get it back to him/her no later than the 10th of the following month.

   Not acceptable: E-mail (HIPAA violation).

4. Mark the Client Contact Form
   - Client Monthly Income and Assets
   - Eligibility/Screening done for both LIS and MSP
   - Application Assistance if you submitted an application
   - MIPPA 01 for completed LIS application, 02 for substantial assistance with MSP, 03 for both LIS and MSP

   You can also refer a client, toll-free, to Oregon Medicare Savings Connect, 1-855-447-0155