

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](tel:1-503-947-7092)

Still acceptable:

- Call the State SHIBA line ([1-800-722-4134](tel: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**