Attachment 1 – Sample Tracking Sheet for LIS/MSP applications

This information is needed to track the benefit status of people we assist. It is information we already have available as we help people enroll. It will go to Donna Delikat at State SHIBA, who has a secure system for tracking. SHIBA Volunteers should securely report this information to their coordinators (via FAX or phone) no later than the 10th of the following month.

People with Medicare who have limited income and resources may also be referred to Oregon Medicare Savings Connect, 1-855-447-0155, for screening and enrollment.

Client Name (exactly as listed on Medicare or SSA card)	**ZIP**	**DOB or MCN** Use MCN only if you do not have exact name spelling	**Applied for LIS** (via BCU, SSA or paper)	**Referred for MSP**
Ex: John Smythe	97034	12/23/36 **or** 333-22-6666b	BCU	yes