



2017 SMP/SHIP National Conference

JULY 10–13, 2017 AUSTIN, TX

**Counseling Case Studies: Issue
spotting and Problem solving**

July 11, 2017

Workshop Goals

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- Identify counseling issues in case studies
- Resolve problems case studies present
- Practice counseling skills
- Review relevant guidance and resources

Instructions

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- Break into five (5) small groups
- Appoint one “client,” who takes 2 to 3 minutes to read through the case study
- Group interviews the client; spots issues; identifies problems; discusses potential solutions (15 minutes)
- Appoint a person who summarizes the case and reports out to large group

Resources: Case Study 1

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- CMS Guidance on Qualified Medicare Beneficiaries (QMB)
 - Beneficiary Education Program: Managed Care Manual, Chapter 4, Section 200.6
 - Improper Billing in MA Plans: 2017 Call Letter Prohibition on Billing Medicare-Medicaid Enrollees for Medicare Cost-Sharing <https://www.cms.gov/medicare/health-plans/medicareadvtspecratestats/downloads/announcement2017.pdf>
 - CMS Medicare Learning Network Booklet Dual Eligibles at a Glance https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/downloads/Medicare_Beneficiaries_Dual_Eligibles_At_a_Glance.pdf

Resources: Case Study 2

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- CMS Guidance on the Part A Hospice Benefit
 - ▣ Hospice Benefit: Medicare Benefit Policy Manual, Chapter 9, Section 40 - Benefit Coverage
 - ▣ Hospice Supplies: Medicare Benefit Policy Manual, Chapter 9, Section 40.1.6
- Center for Medicare Advocacy
 - ▣ Emily Back Hospice Appeal Case
<http://www.medicareadvocacy.org/medicare-ruling-may-open-way-for-new-appeal-process-for-hospice-patients/>

Resources: Case Study 3

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- CMS Guidance on Part B Durable Medical Equipment (DME) Claims
 - ▣ Coverage Rules: Medicare Benefit Policy Manual, Chapter 15, Section 110, Durable Medical Equipment
 - ▣ Limiting Charge Rules: Medicare Claims Processing Manual, Chapter 1, Section 30.3.12.3
- Medicare Interactive Article
 - ▣ Keeping your costs down (for DME)
<https://www.medicareinteractive.org/get-answers/medicare-covered-services/durable-medical-equipment-part-b/keeping-your-costs-down-if-you-are-not-affected-by-the-competitive-bidding-demonstration>

Resources: Case Study 4

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- CMS Guidance on off-label drugs
 - ▣ Part D Drug Definition: Medicare Prescription Drug Benefit Manual, Chapter 6, Section 10.1
 - ▣ Medically Accepted Indication: Medicare Prescription Drug Benefit Manual, Chapter 6, Section 10.6
- SHIP TA Center Newsletter Article
 - ▣ Off-Label Drug Coverage in Medicare Part D
<https://www.shiptacenter.org/resource-published/r2/off-label-drug-coverage-in-medicare-part-d/>
- Medicare Interactive Q&A
 - ▣ Why is my drug plan refusing to cover a drug on its formulary? <https://www.medicareinteractive.org/get-answers/medicare-prescription-drug-coverage-part-d/part-d-coverage-overview/why-is-my-medicare-drug-plan-refusing-to-cover-a-drug-that-is-on-its-list-of-covered-drugs-formulary>

Resources: Case Study 5

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- CMS Guidance on Employer/Union Sponsored Group Health Plans
 - ▣ Medicare Managed Care Manual, Chapter 9
<https://www.cms.gov/Regulations-and-Guidance/Guidance/Manuals/Downloads/mc86c09.pdf>
- CMS Guidance on Special Enrollment Periods (SEP)
 - ▣ Medicare Managed Care Manual, Chapter 2, Section 30.4
- Medicare Interactive Article
 - ▣ Changing Your Medicare Advantage Plan
<https://www.medicareinteractive.org/get-answers/medicare-covered-services/durable-medical-equipment-part-b/keeping-your-costs-down-if-you-are-not-affected-by-the-competitive-bidding-demonstration>

Resources

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□ CMS Medicare Manuals

▣ Internet Only Manual (IOM) pages on CMS website

<https://www.medicareinteractive.org/get-answers/medicare-covered-services/durable-medical-equipment-part-b/keeping-your-costs-down-if-you-are-not-affected-by-the-competitive-bidding-demonstration>

□ CMS Medicare Learning Network (MLN)

▣ *MLN Connects Newsletter, MLN Matters*

<https://www.medicareinteractive.org/get-answers/medicare-covered-services/durable-medical-equipment-part-b/keeping-your-costs-down-if-you-are-not-affected-by-the-competitive-bidding-demonstration>

Contact Us

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- SHIP TA Center
- Medicare Questions?
 - ▣ medicarehelp@shiptacenter.org
- SHIP Center General Information
 - ▣ Website: www.shiptacenter.org
 - ▣ Email: info@shiptacenter.org
 - ▣ Phone: 877-839-2679

Questions?

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