

CMS Unique ID User Job Aid

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Purpose

The Centers for Medicare & Medicaid Services (CMS) Unique ID system is available to State Health Insurance Assistance Programs (SHIPs) and Senior Medicare Patrol programs (SMPs) through a collaboration between the Administration for Community Living (ACL) and CMS. The system is designed to remove barriers to researching beneficiaries’ complex Medicare issues. CMS Unique IDs are used by active, approved, screened, and trained SHIP and SMP team members as a form of verification to provide access to certain beneficiary information when assisting a Medicare beneficiary.

CMS Unique ID holders can speak to 1-800-Medicare Customer Service Representatives (CSRs) by calling **1-888-647-6701**, the phone number designated by CMS for SHIP and SMP CMS Unique ID holders. Without a CMS Unique ID and the use of this designated phone number, SMP and SHIP team members could not talk with 1-800-Medicare CSRs on behalf of beneficiaries regarding their services, claims, or providers unless the beneficiary initiated the call in the presence of the SMP or SHIP team member.

The CMS Unique ID can also be used for speaking with representatives from Medicare Advantage and Part D plans who have agreed to participate in the CMS Unique ID program and the Benefits Coordination & Recovery Center (BCRC) for CMS.

Who is Eligible for a CMS Unique ID?

Because CMS Unique IDs are intended for resolving *complex* beneficiary cases, they will not be needed by every team member. A CMS Unique ID can be approved for active, properly screened and trained SMP and SHIP team members who have completed an annual confidentiality agreement and have received annual privacy training from their SMP or SHIP program.

Definition of Active, Properly Screened and Trained Team Member

To be considered properly screened and trained, team members must have completed the screening and training required by their state program, be certified by their state program, and have signed an agreement or Memorandum of Understanding (MOU) with their local agency. To be considered active, properly trained and state-certified team members must be registered with their SMP or SHIP program and must have provided counseling, information, or assistance related to Medicare or other health insurance in the 12-month reporting period.

CMS Unique ID Management

CMS Unique IDs are created by director-level users in ACL's SHIP and SMP data systems (and by assistant director-level users in the SHIP data system). The SHIP data system is called STARS (SHIP Tracking And Reporting System), and the SMP data system is called SIRS (SMP Information and Reporting System).

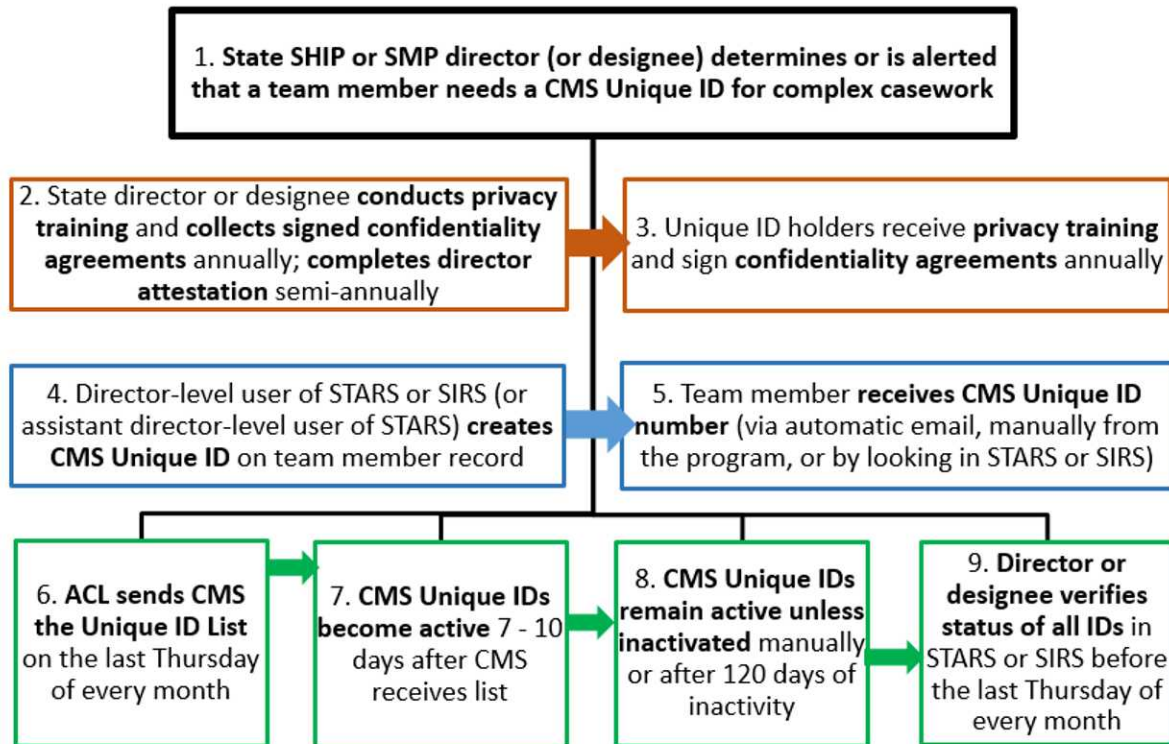
The fields for managing CMS Unique IDs are on the individual team member records in STARS and SIRS, visible only to director roles (including the STARS assistant director role). Team members co-trained in both SHIP and SMP work should only be given one CMS Unique ID. Therefore, co-trained team members who already have a CMS Unique ID in STARS should not be given another one generated by SIRS, and vice versa.

Important Note: CMS Unique IDs are unique for a reason! Each team member who needs to use a Unique ID should be assigned their own ID and should not share it with anyone else.

Process Overview

Under the Unique ID system, SHIP and SMP directors approve and generate Unique IDs for SHIP counselors and SMP complex interactions specialists who have completed a confidentiality statement and who have been trained to be entrusted with private information related to the beneficiaries they counsel.

This chart provides a summary of the overall process:



Unique ID Training and Paperwork

SHIP or SMP directors or their designees must provide you with Unique ID training, including training about maintaining the privacy of your Unique ID number. They must also have you sign a *Confidentiality Agreement for Receipt of Unique ID* before you can be assigned a Unique ID number. ([Information about Unique ID forms, training, and resources is provided toward the end of this job aid.](#))

Unique ID Creation in STARS or SIRS

SHIP and SMP directors and SHIP assistant directors must assign Unique IDs to team members in STARS or SIRS. The Unique ID number is automatically generated by STARS or SIRS. CMS receives your Unique ID from ACL.

Receiving Your Unique ID Number

Depending upon your state or territory, you may receive your Unique ID Number directly from your supervisor, SHIP or SMP director, or SHIP director designee, or you may receive it in

an automated email from STARS or SIRS. STARS and SIRS users can also see their own Unique ID on their team member record. Check with your supervisor to find out how your program is transmitting Unique IDs.

Receiving Your Unique ID by Email

If your program uses STARS or SIRS to transmit Unique ID numbers, see the [Appendix](#) for examples of emails sent from STARS and SIRS.

Finding Your Unique ID Number and Seeing Your Unique ID Status

If you are a team member who logs into the STARS or SIRS data system, you can use the data system to see your CMS Unique ID and your Unique ID Status. If you are a co-trained SMP and SHIP team member, you will need to log into the system that generated your active CMS Unique ID.

1. Log into SIRS or STARS.
2. Open the *Tracking Inbox* menu.
 - a. In SIRS, select “Team Member.”
 - b. In STARS, select “SHIP Team Member.”
3. Find your name in the Tracking Inbox.
 - a. Depending on your user role, you may see the names of other team members or you may see only your own name.
 - b. Rely on your SIRS job aids (SMPs) or the STARS manual (SHIPs) for detailed instructions about navigating the data system.
4. Click on the row containing your name to see the details about you.
5. Scroll down the page to find the Status of 1-800-Medicare Unique ID Number. If it is inactive, you must contact your director to have it reactivated. Immediately following the status is your number:

Status of CMS Unique ID Number*	Active
Number of CMS Unique ID	19584924
Date Of Last CMS Unique ID Status Update	06/06/2023

Sample: Is Not a Real ID

CMS Unique ID Effective Dates

ACL sends CMS an updated CMS Unique ID list on the last Thursday of every month. It takes CMS seven to ten (7 – 10) days to process the monthly CMS Unique ID list from ACL. CMS Unique IDs that are active in SIRS or STARS before the last Thursday of the month will be usable within the following 7 - 10 days. CMS Unique IDs approved on or after the last Thursday of the month will be usable the second month following their approval.

Sent to CMS: The last Thursday of the month
Effective: Within 7 – 10 days

Tip: Be prepared for some lag time, because CMS only updates its Unique ID system monthly!

Considerations

- ✓ An inactivated (i.e. revoked) CMS Unique ID will remain usable until the next ACL-generated CMS Unique ID list is processed by CMS.
 - Inactivation of IDs follows the same schedule as newly activated IDs.
 - Therefore, any CMS Unique IDs that have been inactivated will *not be* on the ACL-generated list sent to CMS.
 - Consequently, they will *no longer be usable* after CMS processes the new list.
- ✓ If a CMS Unique ID is inactivated during a month and is reactivated *before* ACL generates the monthly list for CMS, there will be no interruption in a team member's ability to use their CMS Unique ID.

120 Days of Inactivity and CMS Unique ID Status

The SIRS and STARS data systems have 120-day inactivity rules that will automatically inactivate a team member's CMS Unique ID when inactivity criteria apply. Affected team members will receive an automatic email 7 days prior to the potential inactivation of their CMS Unique ID. Directors are copied on those emails.

- In STARS, the CMS Unique ID status is dependent on the Beneficiary Contact and Beneficiary Additional Sessions forms, regardless of whether the team member has logged in or has conducted other types of SHIP work.
 - The CMS Unique ID will automatically become inactive after 120 days if the team member has no beneficiary contacts for 120 days – i.e. that team member's name does not appear in the *Session Conducted By* fields on any Beneficiary Contact forms or Beneficiary Additional Session forms for 120 days.
- In SIRS, the CMS Unique ID status is dependent on complex interactions, regardless of whether the team member has logged in or has conducted other types of SMP work.
 - The CMS Unique ID will automatically become inactive after 120 days if the team member has no complex interactions for 120 days – i.e., that team member's name does not appear in the *Session Conducted By* field for any complex interactions for 120 days.

Sample CMS Unique ID inactivation email alerts

The following automatic email is sent to STARS and SIRS team members 7 days prior to the potential inactivation of their CMS Unique ID. The director-level user/s for their state or territory is copied on the email.

Email text

Subject Line: CMS Unique ID Expires Soon

"Hello [name]!

This is a reminder that your CMS Unique ID for contacting 1-800-Medicare or participating Medicare plans to resolve complex beneficiary issues will be inactivated in 7 days if a record is not associated with your profile.

Effective Date: The U.S. Administration for Community Living (ACL) will send this number to the Centers for Medicare & Medicaid Services (CMS) on the last Thursday of this month. CMS then needs 7 – 10 days to process this number before it will be usable. Note: If this email is dated on or after the last Thursday of this month, your ID will be sent to CMS the last Thursday of next month.

If you have any questions about the ID, how to use your ID, or the effective date, please contact your supervisor or refer to the CMS Unique ID Job Aid.

[*STARS users see this sentence*: If you have STARS functionality questions, refer to the STARS manual or contact the Booz Allen STARS Help Desk. *SIRS users see this sentence* *SIRS users see this sentence*: If you have SIRS functionality questions, refer to the SIRS Job Aids or contact the Booz Allen SIRS Help Desk.]

Have a great day!”

Important Tip

If your CMS Unique ID becomes inactivated and remains inactive when the list of Unique IDs is provided to CMS, you will not be able to use your CMS Unique ID until it is reactivated by your director and until CMS receives and uploads the next month’s list of active CMS Unique IDs. Unique IDs must be manually reactivated by directors. Once automatically *inactivated*, they cannot be automatically *reactivated* (even if new beneficiary contacts or complex interactions are tied to you through the *Session Conducted By* fields).

CMS Unique ID User Instructions

When using the Unique ID to access beneficiary information from 1-800-Medicare, CMS has established a designated phone number for SHIPs and SMPs: **1-888-647-6701**. When using the Unique ID to access beneficiary information from a Medicare Advantage or Part D plan, call the plan.

When to use your CMS Unique ID

Before using your CMS Unique ID, you must have written or verbal authorization from the beneficiary or their representative to discuss the beneficiary’s plan issues or concerns.

Here are some examples of reasons team members might use their CMS Unique ID:

- Assisting beneficiaries with researching denied claims or claims errors
- Researching possibly inaccurate information on Medicare Summary Notices (MSNs) or Explanations of Benefits (EOBs)
- Checking on premiums for Part C or Part D plans
- Checking on the status of the beneficiary’s enrollment

- Checking on Durable Medical Equipment, Prosthetics, Orthotics, and Supplies (DMEPOS) Competitive Bidding information
- Assisting with a beneficiary's complex case
 - Collecting claim numbers, dates of service, and provider information.
- Reporting a compromised Medicare number
 - Note: Only the beneficiary can request a *new* Medicare number, not SMPs or SHIPs. Beneficiaries must contact Medicare on their own behalf to request a new number if their current number is compromised.
- Unique ID holders can request Medicare Plan Finder assistance in real time. Use the designated phone number with your CMS Unique ID if you have questions about what you are seeing in the plan finder.

There are some limitations to the CMS Unique ID. It *cannot* provide:

- Access to advanced or specialized customer service representatives (CSRs)
 - The 1-800-Medicare CSRs who answer calls made via the CMS Unique ID are the same CSRs who answer other calls to 1-800-Medicare.
- 1-800-Medicare CSRs will not be able to answer all questions about Medicare Advantage or Part D plans
 - It is best to contact plans directly. Some do and some do not participate in the CMS Unique ID program. See the latest list in the SMP and SHIP resource libraries.
- Medicare reconsideration and appeals
 - All appeal requests must be submitted in writing. Appeal rights and where to send the reconsideration request are on the back of the MSN.
- Medicare Secondary Payer information
 - CSRs can only provide status of the beneficiary's record. If changes are required or updates needed, the caller should contact the Medicare Secondary Payer or Benefits Coordination & Recovery Center (BCRC) for specific resolution.
 - Note: If an attorney requires the "Payment Summary" form for settlements, these are available on www.medicare.gov.
- Retroactive enrollments or disenrollments
 - CSRs are only permitted to perform prospective enrollments. If the caller requires a retroactive enrollment, the CSR will transfer the caller to an Internal Support Group CSR to file a complaint. Retroactive enrollments are handled by the CMS Regional Office staff.
- A new Medicare number for beneficiaries whose number is compromised
 - Reminder: beneficiaries must call Medicare on their own behalf to request a new number.

Calling Medicare with your CMS Unique ID

To use your CMS Unique ID with Medicare, follow these steps:

A. Call 1-888-647-6701. An automated voice will greet you and ask you to enter your Unique ID number.

- **Note:** Using this phone number in conjunction with your CMS Unique ID gives you a priority position in 1-800-Medicare's queue of callers. When call volumes are high, such as during Medicare's fall Open Enrollment Period (OEP), wait times might still apply.

B. Enter your CMS Unique ID number. If you enter your CMS Unique ID incorrectly or enter an invalid CMS Unique ID, you will hear the regular menu of options presented to all callers who call 1-800-Medicare. If you enter your number correctly, you will be able to select from the following menu options:

- If you have General Questions, press 1
- If you have questions about a doctor's service or hospital visit, press 2
- If you have a question about medical supplies, press 3

Note: CMS says the efficiency in this system relies on you selecting the appropriate option from this menu. It is designed to be very short and to-the-point. It is purposely not as long and descriptive as the menus for accessing CSRs through the public 1-800-MEDICARE number, as CMS assumes SHIP and SMP team members can use the shorthand menus described above. If you do not choose the appropriate menu option, you will not see increased efficiency from the system.

C. Be ready to provide your CMS Unique ID number to the Customer Service

Representative (CSR) who answers and have pertinent beneficiary information ready. In order to verify that the CSR is speaking about the correct beneficiary, CMS says the CSR will request from the CMS Unique ID user at least four of the following pieces of information:

- Beneficiary name as it appears on the Medicare card
- Medicare number
- Medicare Part A and/or Part B effective dates
- Beneficiary date of birth
- Beneficiary address

D. Be ready to answer claims-related questions. Medicare CSRs will commonly ask you if there is a claim involved that has already been processed and/or whether you recognize the provider or supplier listed on the Medicare Summary Notice (MSN).

Call 1-888-647-6701

Important: This dedicated phone number for calling Medicare is only for SHIP and SMP team members with CMS Unique IDs. It is not to be shared with the public.

Calling Others with your CMS Unique ID

Participating Medicare Plans

Annually, CMS provides a list of Medicare Advantage and Part D prescription drug plans that participate in the CMS Unique ID program. When it becomes available from CMS each year, ACL sends the list to the SHIP director listserv and the SMP director listserv. This list is also available in the SMP and SHIP resource libraries. The list is based on responses from plans to CMS.

The list of participating Medicare plans includes the following fields:

- Plan contract number (ID)
- Plan type
- Contract name
- State (service area(s))
- Plan Call Center number for current members (where there is no number, one was not provided)
- Plan Call Center number for prospective members (where there is no number, one was not provided)

Team members with a valid and current CMS Unique ID should be able to access these plans using their CMS Unique ID number to help support beneficiaries they serve, as needed.

Participating plans will have access to the most current list of CMS Unique IDs through CMS' Health Plan Management System (HPMS), Complaint Tracking Module (CTM).

Calling the Benefits Coordination & Recovery Center (BCRC)

The number SMPs and SHIPs should use to call the BCRC is **1-855-798-2627**. The Benefits Coordination & Recovery Center (BCRC) was formerly known as the Coordination of Benefits Contractor (COBC). It consolidates the activities that support the collection, management, and reporting of other insurance coverage for Medicare beneficiaries. The purpose of the program is to identify the health benefits available to a Medicare beneficiary and to coordinate the payment process to prevent mistaken Medicare payment. The BCRC does not process claims or claim-specific inquiries. The Medicare Administrative Contractors, (MACs), intermediaries, and carriers are responsible for processing claims submitted for primary or secondary payment and resolving situations where a provider receives a mistaken payment of Medicare benefits.

When to contact the BCRC:

- To report employment changes, or any other insurance coverage information
- To report a liability, auto/no-fault, or workers' compensation case
- To ask a general Medicare Secondary Payer question
- To ask a question regarding the Medicare Secondary Payer letters and questionnaires

Reporting CMS Unique ID Problems

CMS is very interested in ensuring the CMS Unique IDs are working correctly. If you encounter problems using your Unique ID, report the issue using the process outlined in the CMS Unique ID Complaint Form in the Resource Library.

Unique ID Forms, Training, and Resources

CMS Unique ID resources are housed in the password-protected SMP and SHIP resource libraries at www.smpresource.org and www.shiptacenter.org, respectively, and include:

- **CMS Unique ID user job aid**
- **Confidentiality agreement form**
- **Complaint form**
- **Privacy training**
- **Training webinar archives**
- **CMS list of participating plans**

Tip for joint SHIP/SMP team members

If you work with both SHIP and SMP, you will only have one CMS Unique ID. Work with the director from the program that assigned your ID to complete your Unique ID paperwork and training.

Important Note: Each year, all CMS Unique ID users are required to complete privacy training and sign a new confidentiality agreement. Also, prior to being assigned a CMS Unique ID, SHIP and SMP team members should complete all required role-specific training (such as SHIP counselor training or SMP complex interactions training). Talk to your supervisor or director about which specific training you are required to take.

Technical Assistance

- **Booz Allen Hamilton (a.k.a. “Booz Allen”) Help Desk:** For technical assistance such as difficulties with usernames and passwords.
 - Call: 703-377-4424
 - For STARS technical assistance, email boozallenstarshelpdesk@bah.com.
 - For SIRS technical assistance, email boozallensirshelpdesk@bah.com.
- **SHIP National Technical Assistance Center (SHIP TA Center):**
 - **STARS Support.** The SHIP TA Center provides webinar training, technical assistance, and a STARS manual. Contact the SHIP TA Center at stars@shiptacenter.org or 877-839-2675.
 - **Resource Library Support.** For assistance finding Unique ID forms and training resources in the password-protected area of the SHIP TA Center’s website, www.shiptacenter.org, contact them at 877-839-2675 or info@shiptacenter.org.
- **SMP National Resource Center (SMP Resource Center):**
 - **SIRS Support.** The SMP Resource Center provides webinar training, technical assistance, and written job aids on SIRS. Contact the SMP Resource Center at SIRS@smpresource.org.
 - **Resource Library Support.** For assistance finding Unique ID forms and training resources in the password-protected area of the SMP Resource Center’s website, www.smpresource.org, contact them at 877-808-2468 or info@smpresource.org.

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Appendix: CMS Unique ID Emails from STARS and SIRS

For team members whose program uses STARS or SIRS to transmit Unique ID numbers, examples of emails sent from STARS and SIRS are provided below.

SHIP email from STARS

Sending address: DoNotReplyACLSystems@bah.com

Subject line: CMS Unique ID from STARS

Email body text:

Hello!

Your State Health Insurance Assistance Program (SHIP) director has assigned you a CMS Unique ID for contacting 1-800-Medicare or participating Medicare plans to resolve complex beneficiary issues. This ID was generated by the SHIP Tracking and Reporting System (STARS).

CMS Unique ID Number: *{a number unique to you will appear here}*

Effective Date: The U.S. Administration for Community Living (ACL) will send this number to the Centers for Medicare & Medicaid Services (CMS) on the last Thursday of this month. CMS then needs 7 – 10 days to process this number before it will be usable. Note: If this email is dated on or after the last Thursday of this month, your ID will be sent to CMS the last Thursday of next month.

If you have any questions about the ID, how to use your ID, or the effective date, please contact your supervisor or refer to the CMS Unique ID Job Aid.

If you have STARS functionality questions, refer to the STARS manual or contact the [Booz Allen STARS Help Desk](#).

Have a great day!

SMP email from SIRS

Sending address: DoNotReplyACLSystems@bah.com

Subject line: CMS Unique ID from SIRS

Email body text:

Hello!

Your Senior Medicare Patrol (SMP) director has assigned you a CMS Unique ID for contacting 1-800-Medicare or participating Medicare plans to resolve complex beneficiary issues. This ID was generated by the SMP Information and Reporting System (SIRS).

CMS Unique ID Number: *{a number unique to you will appear here}*

Effective Date: The U.S. Administration for Community Living (ACL) will send this number to the Centers for Medicare & Medicaid Services (CMS) on the last Thursday of this month. CMS then needs 7 – 10 days to process this number before it will be usable. Note: If this email is dated on or after the last Thursday of this month, your ID will be sent to CMS the last Thursday of next month.

If you have any questions about the ID, how to use your ID, or the effective date, please contact your director or refer to the CMS Unique ID Job Aid.

If you have SIRS functionality questions, refer to the SIRS job aids or contact the [Booz Allen SIRS Help Desk](#).

Have a great day!