

**NEW YORK STATE OFFICE FOR THE AGING**

2 Empire State Plaza, Albany, NY 12223-1251

Andrew M. Cuomo, Governor  
Director

Greg Olsen, Acting

An Equal Opportunity Employer

**PROGRAM INSTRUCTION**

**Number 19-PI-04**

**Supersedes 15-PI-05**

**DATE:** February 27, 2019

**TO:** HIICAP Coordinators

**SUBJECT:** New SHIP Unique Counseling ID Confidentiality Form

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**ACTION REQUESTED:**

As of March 1, 2019, please use the attached State Health Insurance Program's (SHIP) Unique ID Confidentiality form for all SHIP Unique Counseling ID requests.

Any older versions of the SHIP Unique Counseling ID Confidentiality form received after March 1, 2019, will not be accepted.

**PURPOSE:**

The SHIP Unique Counseling ID is a system developed by the Centers for Medicare and Medicaid (CMS) for SHIP Counselors to obtain information from 1-800 Customer Service Representatives (CSR), Medicare contractors and private insurance plans. Assuming consent has been granted by the beneficiary, this Unique ID system allows State and local HIICAP staff (including volunteers) to discuss Medicare claims and concerns on the beneficiary's behalf, without the beneficiary being present. The SHIP Unique Counseling ID also requires mandatory reporting on activities with the STARS reporting system.

The purpose of this policy form change is to:

- Reaffirm that the SHIP Unique Counseling ID is used for free and unbiased counseling,
- Reaffirm the confidential nature of the SHIP Unique Counseling ID,

- Reaffirm that the local HIICAP Program Coordinator acknowledges a HIICAP counselor’s authority and use,
- Reaffirm the local HIICAP Program Coordinator’s responsibility to notify the NYS HIICAP Director of counselor terminations,
- Reaffirm that mandatory reporting is required and any inactivity within 90 days of STARS will result in the loss of access to the SHIP Unique Counseling ID, and
- Misuse of the SHIP Unique Counseling ID will result in termination of ID access and possible investigations.

HIICAP Coordinators must carefully determine who should be granted a SHIP Unique Counseling ID and submit the completed and signed forms to the State HIICAP Director at NYSOFA. The HIICAP Director is the State Administrator who has the final authority on approvals, denials, revocation or reinstatement of SHIP Unique Counseling IDs for those at the local level.

**PROGRAMS AFFECTED:**

- |                                      |  |  |
|--------------------------------------|--|--|
| <input type="checkbox"/> Title III-B | <input type="checkbox"/> Title III-C-1     | <input type="checkbox"/> Title III-C-2 |
| <input type="checkbox"/> Title III-D | <input type="checkbox"/> Title III-E       | <input type="checkbox"/> CSE           |
| <input type="checkbox"/> EISEP       | <input type="checkbox"/> NSIP              | <input type="checkbox"/> Title V       |
| <input type="checkbox"/> Other       | <input checked="" type="checkbox"/> HIICAP | <input type="checkbox"/> LTCOP         |
|                                      | <input type="checkbox"/> WIN               | <input type="checkbox"/> Energy        |

**CONTACT PERSON:** Brenda LaMere  
NYS HIICAP Coordinator

**TELEPHONE:** 518-474-6085

Helen Fang  
Aging Services Program Analyst

**TELEPHONE:** 518-473-3002

## SHIP Unique Counseling Identification

01/2019

Carrier Customer Service Representative (CSR) is a system that is set up between the Centers for Medicare and Medicaid Services (CMS), 1-800-Medicare contractors and Medicare private insurance plans through a Unique ID system to allow State and local SHIP staff to discuss a beneficiary's Medicare claim without the beneficiary being present.

In order to obtain a SHIP Unique Counseling ID, you must be registered with STARS. If you do not have a STARS Team Member Profile, please speak to your Agency HIICAP Coordinator.

Once registered with STARS:

- Email or fax this completed form to the NYS HIICAP Program (fax 518-486-2225).

Your SHIP Unique Counselor ID request will be sent to the State SHIP Director for approval. Once all documentation is received and approved, you will receive an email with your new SHIP Unique Counseling ID.

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### CONFIDENTIALITY AGREEMENT FOR RECEIPT OF SHIP UNIQUE Counseling ID

- I hereby agree and understand that I am accountable for the protection of the privacy and confidentiality of the information that is disclosed to me pursuant to my use of the SHIP Unique Counseling ID which has been assigned to me by CMS. This ID, along with other identifying information will allow a CSR to disclose certain beneficiary eligibility and claims payment-specific information to me for the purpose of assisting the beneficiary.
- I understand this ID is to be confidential and I am not to disclose this ID to anyone other than the CSR, Medicare contractor or Medicare private insurance plan representative.
- I understand that if I use this ID for any purposes other than to provide free, unbiased HIICAP counseling, my permissions will be terminated, and I will be subject to investigation.
- I understand that I will maintain an active STARS account by maintaining monthly updated beneficiary contacts and group or media outreach and education events.
- I understand that STARS will automatically place me into an inactive STARS status, affecting my ID, if I fail to actively report at least once every 90 days.

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Agency

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PRINT Counselor Name

\_\_\_\_\_  
Signature/Approval of County HIICAP Coordinator

\_\_\_\_\_  
Date

\_\_\_\_\_  
Counselor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
NY SHIP Director Signature

\_\_\_\_\_  
Date Generated