OFFICE of the INSURANCE COMMISSIONER
WASHINGTON STATE
SHIBA

# Statewide Health Insurance Benefits Advisors

# (SHIBA)

# Sponsor Operations Manual

# SHIBA Sponsor Operations Manual

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SHIP Volunteer Program Management Manual

Submit comments or input for the Sponsor Operations Manual to:
shiba@oic.wa.gov

# Introduction

## Overview

The Statewide Health Insurance Benefits Advisors (SHIBA) Sponsor Operations Manual provides standardized processes and procedures to support the SHIBA mission and Office of the Insurance Commissioner's policies and procedures.

### SHIBA Mission

SHIBA provides free, unbiased information about health care coverage and access to help improve the lives of all Washington state residents. We cultivate community commitment through partnership, service and volunteering.

# Section 1 - Contract Management

## Performance measures

The sponsor performance measurements define the goals and expectations of our sponsors in supporting the SHIBA mission. These performance measures are formatted to:

- Gauge the availability and accessibility of assistance to consumers
- Show how we used resources
- Determine if we have sufficient resources available to our sponsors to reach their goals
- Indicate where we need to focus to enhance overall program performance

These measures are intended as tools for program management and future funding requests to potential grantors. Office of the Insurance Commissioner (OIC) may offer future additional funding or performance bonuses, however base funding is not linked to performance.

All of the outlined performance measures are in alignment with the mission statement of SHIBA and the OIC.

**What SHIBA cares about**

- We believe in equity – We are committed to providing equal access to all citizens of Washington State.
- Cost effectiveness matters – We want to be good stewards of public funds.
- The quality of service is important – timely, accurate and actionable information is key.
- We invest in sustainability – Volunteer capacity needs to grow along with the increase in demand for our services.

**What SHIBA is aiming for**

- Focus on key results versus all results.
- Ensure performance measures are reasonable and achievable.
- Create performance measures that are simple to monitor.
- Ensure performance measures are in alignment with some “already-required” outcomes.
- Create performance measurements that are fair and consistent throughout the network.
- Reduce the total number of performance measurements.
- Focus on performance measurements that have the biggest impact on our communities.

## Monitoring visits

SHIBA program office staff may periodically perform site visits or informal audits at the sponsor's place of business to assure contract compliance.  When there is a decision to conduct a site visit, we will send advance notification along with a set of questions or an administrative check list to the sponsor at least one month prior to the visit.

## Ethics

Due to the OIC's role as a regulatory agency and OIC's relationship with Sponsors and others as current or potential vendors, it's important that no appearance of impropriety exists. OIC and SHIBA staff are unable to accept meals paid for by Sponsors or others with which there may be a conflict of interest. Also, OIC or SHIBA staff cannot buy meals, snacks, etc. for vendors, including sponsors, partners, etc.

## SHIBA Online/data analysis

Funding for SHIBA depends on data we gather about our work.  One example includes the Administration for Community Living (ACL) grant.  Some of our primary funders require data elements as criteria for current and future funding considerations.  SHIBA Online is designed to collect the necessary data to complete reports to funders.  We also want to provide additional funding to our sponsors when possible.  To do this, we need accurate and complete data entered into SHIBA Online.

The SHIBA Online database is also the key driver for sponsors achieving their contractual performance measures.  Funders may offer and provide future additional funding or performance bonuses.  We evaluate performance based on data retrieved from SHIBA Online.

SHIBA Online tracks all of our program activities and helps us pull together grant reports and fundraising requests.

**How does this benefit SHIBA?**

- Helps us efficiently and effectively respond to client needs
- Influences program development
- Informs appropriate resource allocation
- Gives us information on volunteer recruitment, management and retention
- Indicates gaps in partnership development
- Provides data for fund development from a variety of resources, including federal, state and local entities and foundations

**What information does the SHIBA Online database provide?**

- We can find out if all Washington state residents have access to the services SHIBA offers statewide
- Tells us if there is access to SHIBA services at the local level
- We can find out if hard-to-reach populations have access to SHIBA services
- Reveals if we're providing enough one-on-one counseling to clients
- Tells us if we have a well-trained volunteer base
- We can find out if we're providing accurate and timely information to clients

## Billing/reporting

**Reporting and deliverable requirements**

1) Complete and **sign Form A-19** Invoice Voucher Distribution.

   a. Billing Dates:

      | | |
      |---|---|
      | October 15 | April 15 |
      | January 15 | July 15 |

   b. Include your contract number on all documents, including A19 Invoice Vouchers, submitted to Office of the Insurance Commissioner (OIC).

   c. You can mail or send electronically completed and signed A-19 Invoice Voucher Distribution forms to::

      Email: RonH@oic.wa.gov

      *or*

      Mail:
      Office of the Insurance Commissioner
      ATTN: SHIBA Contracts and Grants Coordinator
      Post Office Box 40255
      Olympia, WA 98504-0255

Work Plan Narrative – Template:

Name of person completing the narrative
SHIBA activities
Key partnership activities

- In the narrative section, identify work you did with partners, including initial exploratory meetings, development of partnership agreements (MOU's), and service provision (i.e., counseling, presentations, outreach, referrals, resource sharing, etc.). Offer specific details on key partnership activities, such as:
- Names of the significant partnership organization
- Purpose and description of the activity
- Target population served

Activities, lessons learned, significant events

- Describe activities, lessons, learned (including challenges and problems you encountered), significant events or developments and best practices. Organize this section by using the following headings:
- Outreach (including strategies for under-served populations)
- Staff and volunteer training (including the number of new volunteers you added since last reporting period)
- Best practices

Case studies, extraordinary savings to clients

- Summarize all occurrences in which clients realized a monetary savings associated with discussing a particular topic with a counselor. This summary should include:
- Summary of the question or problem the client described to the counselor
- What action the counselor took
- Outcome or resolution to the problem
- Status of the client contact
- CCR number

Note: Savings to clients could include situations that meet one of the following criteria:

A client received reimbursement for, or was relieved from paying for a health care service or product for which he/she was not responsible due to fraud, waste, or abuse, or

The reimbursement or savings are due to the efforts of the sponsor in educating clients to detect fraud, waste, and abuse in the Medicare and Medicaid programs, or

Referring billing discrepancies, potential fraud, or service quality complaints to appropriate OIC or other staff.

Analysis of SHIBA Online data

- Note trends, opportunities, and wins.

Special Grant or Project Activities (i.e. ACL/SMP)

- Discuss progress towards work plan or outcomes listed in grant application, i.e. SMP, MIPPA, other.

Support Needed/Input

- Discuss any additional resources you need and/or issues that may affect future performance.

List all SHIBA outreach counseling sites

- Include:
  Hours of operation
  Site address
  Phone number
  List of active volunteers/paid staff that staff these sites

## Meeting Representation

Sponsors must provide representation by a decision maker at one in-person meeting and up to one conference call per quarter per the sponsor contract with SHIBA. Sponsor representation can be the sponsor's executive director, program manager, or volunteer coordinator as long as the representative has authority to make final decisions for the sponsor organization.

## Sponsor Equipment

SHIBA sponsors may receive grant funding to buy equipment, software, and other supplies from the OIC. These items are the permanent property of the sponsor organization and cannot be maintained, repaired or replaced by the OIC. Therefore, if items are lost, stolen, damaged, suffer from software incompatibility, or otherwise no longer operate, the OIC will not repair, be liable, pay for, or be required to replace or provide technical support for the equipment, software, or supplies.

## Corrective Action

Sponsors must perform certain tasks associated with the delivery of the SHIBA program. These requirements are outlined in the Scope of Work, or Statement of Work section of the sponsor contracts. Baseline performance figures are specific to the geographic location being served and are included in each sponsor contract. We monitor these specific measures monthly and quarterly and ad hoc, if necessary.

Quarterly review of work performance captured in the narrative and performance reports submitted by the sponsors, ad hoc, or scheduled audit reviews to help identify when deficiencies occur and when corrective action is needed.

SHIBA suggests corrective action when deficiencies are identified.

Deficiencies include:

- Consistent late performance, i.e. submission of monthly and quarterly billing paperwork or other reports
- Failure to perform all or parts of the contract
- Consistent inadequate or low-performance measures results
- Failure to ensure client and volunteer health or safety
- Other significant audit or monitoring findings
- Failure to attend required meetings

## Contract Termination Procedures

OIC may terminate a sponsor contract based upon convenience or default. Contract termination language and timelines are listed in each sponsor contract.

**Termination of Convenience**

Even though termination of convenience is OIC's right and is initiated by OIC, it's primarily used when both parties mutually agree to end the contract. Termination for convenience may also be used when there are no funds available to continue with the contracted services.

Termination for convenience might occur when the sponsor knows that they can no longer fulfill its contractual obligations and does not want an opportunity for correction. Instead of going through the default process, the organization would let the OIC know it cannot fulfill its obligations and would like to end the contract on good terms. The decision would be a mutual one based upon what is best for all involved, including the community being served.

**Termination by default**

Termination by default occurs when the sponsor does not fulfill its contractual obligations and we have given the sponsor an opportunity to correct its actions, but it failed to do so.

# Section 2 – Language Assistance

## Service to Limited English-Speaking Clients

We make every effort to help people from all walks of life regardless of his/her primary language. To provide the best service, please follow these steps:

- Use a bilingual volunteer either from your team or another SHIBA team, if they are willing and available.
- Use the Language Link resources to interpret. The Language Link can also be used to set appointments.
- Get the help of other groups that have language resources or native speakers.
- Ask a family member or friend of the client to help.

Another resources to help limited English-speaking clients is:

**The National Alliance for Hispanic Health**
1-866-783-2645 (English and Spanish)

## LanguageLink services

CTS languagelink
*We speak your customer's language*

### How to Use Interactive Voice Response (IVR)

**Step 1:** **Call 1 888-338-7394**

**Step 2:** Enter Account Number **19097**, followed by # sign

**Step 3:** Select 1 to be connected directly to your Spanish interpreter, *or*
Select 2 to be connected directly to your Russian Interpreter, *or*
Select 3 to be connected directly to your Vietnamese interpreter, *or*
Select 4 to be connected directly to your Somali Interpreter, *or*
Select 9 for all other languages

***If you require a 3rd party call, press 9 to reach a Customer Service Representative**

IVR FAQs:

**What if I do not know my Account number?**
You do need this information in order to reach the interpreter directly. If you are unsure of your account number, wait and the system will direct you to a live operator who will look up your account.

**What is IVR?**
IVR stands for Interactive Voice Response. CTS LanguageLink's IVR system allows a customer to quickly select the language desired for interpretation and be connected immediately to an interpreter without interaction with a live attendant. The benefit of this is an even faster connect time to your interpreter and better service to your limited English proficient (LEP) client.

**What is a third party call?**
A third party call is when you need CTS LanguageLink to call the LEP client and then bridge the call together with you and the interpreter.

**How do I make a third party call with CTS LanguageLink?**
If you need a third party call, press 9 ***(even for Spanish)*** to reach a Customer Service Representative (CSR) and let the operator know you need a third party call. We are happy to assist you with this at no additional charge. Our ***interpreters are not able to make the third party call*** directly.

**I need another language other than the ones listed. How do I get my interpreter on the line?**
Press 9 for other languages and let the CSR know which language you require and they will connect you. If the language is unknown, you may reference the "Point to your Language" visual for help with most requested languages.

SHIBA Sponsors, for issues or problems with this service, please contact:

Email: shiba@oic.wa.gov
SHIBA Secretary Senior: (360) 725-7073

SHIBA OFFICE of the INSURANCE COMMISSIONER WASHINGTON STATE

## TIPS AND ADVICE

### *How to Work with a Telephone Interpreter*

### YOUR ROLE

Telephone interpreters may receive several calls a day—each one requiring special attention in a specific field. When working with an interpreter over the phone, there are a few things you should keep in mind to ensure your call is handled quickly and successfully.

- Always speak in first person, just as you would in normal conversation. For example, say, "Do you have a fever?" rather than "Ask her if she has a fever, please."
- Immed iately introduce yourself to the limited-English proficient (LEP) client and explain your reason for calling.
- Telephone interpretation is "consecutive" interpretation. That means you will experience pauses when the interpreter repeats each statement in the respective language.
- After you speak one-two sentences or finish a thought, pause to give the interpreter enough time to interpret.
- Be prepared to explain some things in more detail for the telephone interpreter. Some terminology and concepts may not have an equivalent in the target language.
- Control the conversation. The telephone interpreter is only there to interpret. You are responsible for making sure the LEP client receives the same service as an English-speaking client.
- Ask the interpreter and the LEP client questions to ensure they understand what you want to communicate.
- Avoid asking the interpreter for his/her opinion about the situation being interpreted.
- We can accommodate three-way telephone interpretation calls. Tell the call center agent the name and phone number of the third party, and they will arrange the call for you. The interpreter cannot facilitate this for you. You must ask the call center agent at the beginning of the call.
- Follow up by providing us with feedback about your interpretation services.

### YOUR TELEPHONE INTERPRETER'S ROLE

We expect our interpreters to meet high standards and want to know when they are meeting our expectations.
To that end, your feedback is critical.

- Make sure your interpreter introduces himself/herself using a first name and ID number. They are not required to provide a last name.
- Your interpreter should not have a side conversation with you or the client. He or she must relay everything that is said back to you or your client. This includes any advice that the client may ask of the interpreter.
- Your interpreter should not discuss anything unrelated to the telephone interpretation assignment.

More questions about interpretation? Contact us at 1-855-579-2704 or clientrelations@ctslanguagelink.com.

## American Sign Language (ASL)

The SHIBA program office can arrange ASL interpreters for SHIBA outreach events. The SHIBA program office will coordinate the procurement of the ASL interpreter services for the event.

To request an ASL interpreter, include the following in an email *at least 15 business days prior to the event date* to shiba@oic.wa.gov:

- Event name
- Date
- Time
- Location (street address, room number, etc.)
- Number of attendees for the event (hearing and non-hearing)
- Deaf attendee name(s) (if possible)

ASL clients are generally familiar with interpreters in their communities and have a preference. If possible, provide the names of the deaf attendees in the email also. The interpreter service will try to matchup preferred interpreters.

If you have any questions, contact the SHIBA programs supervisor at (360) 725-7225 or the program administrative assistant at (360) 725-7097.

# Section 3 – open section

# Section 4 - Medicare Unique IDs

| A. WHO NEEDS A UNIQUE ID? | |
|---|---|
| 1. **Not all SHIBA volunteers need a Unique ID.**<br><br>2. Unique IDs can be issued to volunteers who *provide complex counseling*. Volunteers with Unique IDs are able to contact CMS-Medicare on the consumer's behalf.<br><br>3. Individuals who are not paid staff with active SHIBA sponsors or active SHIBA volunteers cannot be sponsored by the SHIBA program to receive a Unique ID. | **VOLUNTEER AND VOLUNTEER COORDINATOR** |
| **B. WHO IS AUTHORIZED TO APPROVE UNIQUE IDs?** | **ROLES** |
| 1. The SHIBA program manager has authority to approve Unique IDs upon verifying that all criteria are met per the SHIP NPR User Manual and specified below. The SHIBA program manager may delegate this authority.<br><br>2. The administrative assistant is fully responsible and accountable for ensuring all criteria are met per the SHIP NPR User Manual. | **PROGRAM MANAGER/ ADMINISTRATIVE ASSISTANT** |
| **C. CRITERIA FOR UNIQUE ID** | **ROLES** |
| ❍ Cleared WSP Background Check, even if grandfathered in prior to 02/2006.<br>❍ Signed Confidentiality Agreement in program office.<br>❍ Completed Path to Certification *or* verifiable SHIBA counseling experience.<br>❍ Volunteer coordinator concurs volunteer is ready for Unique ID.<br>❍ Volunteer has email address unique to them (SHIP NPR system requirement). | **VOLUNTEER AND VOLUNTEER COORDINATOR** |
| **D. INITIATE A REQUEST FOR A UNIQUE ID FROM PROGRAM OFFICE** | **ROLES** |
| 1. Volunteer coordinator emails shiba@oic.wa.gov to notify the administrative assistant the name of the volunteer who is requesting a Unique ID.<br><br>NOTE: Requests received directly from volunteers will be routed back through the volunteer coordinator for confirmation. | **VOLUNTEER COORDINATOR** |

| | |
|---|---|
| 2. The administrative assistant will work with the volunteer coordinator to ensure the above criteria is in place.<br><br>3. The administrative assistant will notify the volunteer coordinator and volunteer when all criteria have been met. | **ADMINISTRATIVE ASSISTANT** |
| **E. INITIATING A REQUEST FOR UNIQUE ID IN SHIP NPR** | **ROLES** |
| 1. The volunteer will go to My SHIBA and reference the *How to Request a Unique ID instructions* to initiate a request online in SHIP NPR.<br><br>a. The volunteer can email shiba@oic.wa.gov with any questions or problems initiating the request for a Unique ID in SHIP NPR. | **VOLUNTEER** |
| 2. Once the Request for Unique ID notification is received from SHIP NPR, the administrative assistant will verify requestor has met all the criteria.<br><br>3. Upon verification that criteria has been met, the administrative assistant will approve the request in SHIP NPR and sign Confidentiality Agreement on behalf of the SHIBA program manager.<br><br>4. The administrative assistant will look up the Unique ID number in SHIP NPR.<br><br>5. The administrative assistant will send volunteer their Unique ID number.<br><br>6. The administrative assistant will email the volunteer coordinator to notify them the volunteer has received their Unique ID.<br><br>7. The administrative assistant will update the Volunteer Tracking spreadsheet.<br><br>NOTE: Unique ID's are not activated instantly once assigned. There is a lag time for activation. New Unique ID's should be ready to use on the first week of the following month. | **ADMINISTRATIVE ASSISTANT** |

**NOTE:**

Effective March 1, 2017, Unique IDs will be automatically inactivated if Unique ID has not been used and there are no CCRs entered for 120 consecutive calendar days.

Volunteer coordinator will notify the administrative assistant when a Unique ID needs reinstated. Requests received from volunteers will be routed back through the volunteer coordinator for confirmation. Reactivation should be ready to use on the first week of the following month.

It is incumbent on the volunteer to monitor his/her own activity to ensure the Unique ID remains active for use as needed.

| F. INACTIVATE A UNIQUE ID | ROLES |
|---|---|
| 1. Volunteer coordinator will notify the administrative assistant immediately when a volunteer becomes inactive and indicate if they have an assigned Unique ID. | **VOLUNTEER COORDINATOR** |
| 2. The administrative assistant will inactivate volunteer's Unique ID in SHIP NPR<br><br>3. The administrative assistant will update the Volunteer Tracking spreadsheet. | **ADMINISTRATIVE ASSISTANT** |
| **G. REINSTATE A UNIQUE ID** | **ROLES** |
| 1. Volunteer coordinator will notify the administrative assistant when a Unique ID needs reinstated. | **VOLUNTEER COORDINATOR** |
| 2. The administrative assistant will ensure criteria are met prior to reactivating Unique IDs.<br><br>3. The administrative assistant will notify the volunteer and volunteer coordinator when the Unique ID has been reinstated.<br><br>4. The administrative assistant will update the Volunteer Tracking spreadsheet. | **ADMINISTRATIVE ASSISTANT** |

# Section 5 - My SHIBA

My SHIBA is a webpage for:

- OIC and SHIBA staff
- Sponsors
- Volunteer coordinators
- Volunteers

If you lost the password to access My SHIBA, email shiba@oic.wa.gov.

You can provide the password to new volunteers to access the online training library while they're waiting to attend Basic Training in person or for access to complete it online.

Volunteer coordinators and volunteers can also access My SHIBA to help perform SHIBA related activities.

Here are some of references, forms, and links you can find on My SHIBA:

- SHIBA Online
- SHIBA Online practice site
- SHIBA training library
- Publications
- Medicare Open Enrollment tools
- Outreach procedures, forms, and guidance
- Counseling related resources
- News and Events
- Contact information
  - SHIBA staff directory
  - SHIBA sponsor directory
- Regional Training Consultant area map
- Forms
  - CCRs
  - Complaint forms
  - Travel instructions and forms
  - Volunteer application packet

The SHIBA program communications consultant maintains the My SHIBA website. Email issues or suggestions to shiba@oic.wa.gov to the attention of the communications consultant.

# Section 6 – Outreach Events

## Outreach event goals

The primary goal of an outreach event is to educate new and existing consumers on Medicare options. The events encourage consumers to schedule a counseling session with our community volunteers to address their individual needs. When deciding on where to facilitate an event, OIC SHIBA and sponsors should review sponsor performance, Medicare population trends, areas with high concentrations of limited- English and/or low-income consumers, as well as the interest and engagement of our community partners. The following are general goals that frame the operational practice of the SHIBA outreach efforts:

- Educate consumers on Medicare and other health care coverage programs
- Increase public awareness of SHIBA services, local sponsors and volunteer opportunities
- Improve the overall performance in areas/slices identified as an "under-performer" in various programs, i.e., client contacts, volunteer recruitment/retention, public media activities, etc.
- Provide a venue to promote partnerships with other state agencies and community-based organizations
- Distribute and collect surveys from attendees to evaluate event success
- Promote volunteer recruitment

## Expected outcomes

Each event requires a detailed recording in SHIBA Online as a Public and Media Activity (PMA) listing. Any individual counseling completed by staff or volunteers requires documenting it in the Client Contact Records (CCRs) in SHIBA Online.

If OIC sub-contracted the event with a community sponsor, the community sponsor submits a narrative report to the SHIBA grants and budget coordinator that includes numbers served and outcomes. The report is specified in the contract with the community sponsor. The SHIBA program supervisor ensures the PMA(s) are entered into SHIBA Online.

## Evaluating for success

The SHIBA leadership team will regularly review the outreach results and reports. The team will evaluate the PMA and CCR totals to determine if outreach efforts increased client contacts in the areas that held outreach events. SHIBA will notify sponsors about the results after it evaluates an event's success.

## Outreach event types

Some outreach events types follow, but are not limited to:

- Welcome to Medicare – For consumers turning age 65
- Community health fairs – Limited-English, senior housing, shred events, etc.
- Community Colleges - Continuing education for current and soon-to-be Medicare eligible
- Senior Medicare Patrol (SMP) - Fraud prevention and awareness

Sponsors are encouraged to coordinate with their regional training consultant to seek out imaginative outreach opportunities to benefit Medicare beneficiaries in their contracted area.

**Welcome to Medicare**: OIC has a formal data-sharing agreement with the Washington State Department of Licensing (DOL). OIC receives a list, two times a year, of Washington State residents turning age 65. SHIBA uses the DOL list for outreach event invites and direct mailers such as fliers, postcards, or brochures. Per the data sharing agreement, OIC cannot share the DOL list. SHIBA sorts the DOL list by the number of addresses (consumers) by county. SHIBA can share with sponsors the sorted list that shows the number of addresses by county.

Once the SHIBA sorts the DOL data by zip code, he or she will consult with the SHIBA program manager and the grants and budget coordinator to identify a priority list. In developing a priority list, SHIBA will give consideration to zip codes with the highest number of people turning age 65, areas with low CCR performance, and sponsor's capacity to handle increased call volume.

OIC is responsible for the direct mailing using the DOL list for event invites and direct informational mailing only. Most event planning and associated costs are covered directly by OIC, or with a sub-contract with a community sponsor, or in combination.

All sponsors receive the list containing the county/number of addresses. Sponsors in areas targeted for a Welcome to Medicare event are contacted to see if they're interested in facilitating a Welcome to Medicare event. Sponsors who serve areas where direct informational-only mailings will be sent out are notified so they can plan for potential increased client contacts.

Sponsors not selected to facilitate a Welcome to Medicare event may submit a proposal to facilitate another type of outreach event. The proposal should include the type of event. Sponsors should submit the proposal to the SHIBA program supervisor and grants and budget coordinator. The proposal should include SHIBA support needs, such as direct mailings, RSVP acceptance/tracking assistance, facility/venue approval process, publications, etc. SHIBA will consider the proposal within its available resources.

Welcome to Medicare events require at least four months of advanced planning. The events require significant resources including, but not limited to:

- Budget consideration
- Facility/venue selection
- Signage
- Speaker coordination
- Agenda development
- Presentation development and approval
- Staff resources to accept and track RSVPs
- Direct-mailing design and coordination
- Publications
- Event setup and clean up

**Community health fairs**: Community health fairs are a good way to attract consumers. They often include flu shots, blood pressure checks, cholesterol screening, shredding confidential documents, over-the-counter drug disposal, and other services.

OIC SHIBA may elect to sponsor a community health fair by contracting with a local agency or sponsor. These events typically reach consumers in targeted populations, such as those with limited-English, low-income, rural, or disabled. OIC contracts with local agencies to facilitate the entire event. The SHIBA Medicare presentation is required for all SHIBA-related events. After the event, the community sponsor submits a report to the SHIBA program manager on the number of attendees and program outcomes.

Sponsors who facilitate community health fairs enter a Public Media Activity (PMA) on SHIBA Online and may be asked to submit a narrative on the event for future event planning reference or for grant reporting.

**Community college continuing education classes**: SHIBA regional training consultants (RTCs) are responsible for developing Medicare classes with their local community colleges. The courses are offered with their community education series. RTCs will involve the local sponsor in most cases to prepare for increased client contact and to coordinate volunteer assistance.

**Senior Medicare Patrol (SMP):** SHIBA sponsors have a primary responsibility per contract language to facilitate Medicare fraud prevention workshops in their community. OIC SHIBA may elect to facilitate additional SMP workshops.

## SHIBA event calendar requests

Volunteer coordinators can advertise SHIBA outreach events by submitting an *Event Calendar Request* at least 15 calendar days prior to the event. The event calendar request link is on My SHIBA. The SHIBA secretary senior posts the outreach event requests to the SHIBA Events Calendar on the Office of Insurance Commissioner's webpage.

NOTE: Sponsors should submit event calendar requests for the Annual Medicare Open Enrollment (Oct. – Dec.) at least 4 – 6 weeks ahead of time, if possible, to allow time to post the significantly higher volume of event calendar requests.

Direct all questions or follow-up on event calendar requests to the SHIBA secretary senior at (360) 725-7073 or shiba@oic.wa.gov.

## Presentations

Approved presentations are posted on My SHIBA:

- Decide who will give the presentation (volunteer coordinator or volunteer).
- Based on the topic, use the appropriate SHIBA office-approved slide show (located on My SHIBA).
- Remember, you may hide existing slides to meet the time allotted for the presentation and your audience's needs – but you **cannot create new slides or change existing content, or create a whole new slide show presentation.**

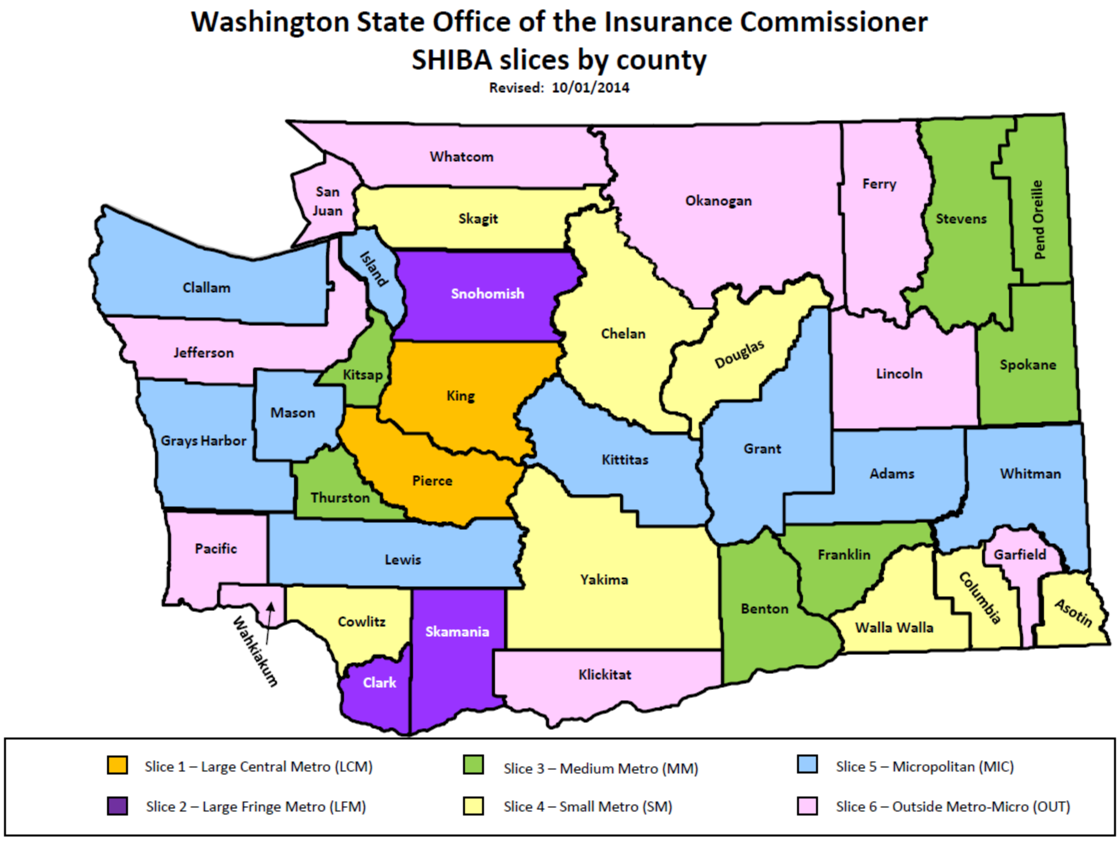
## Speaker requests

Speaker requests are submitted from groups, such as community organizations, senior housing, and other local and state agencies through the Speaker Request form located on the public SHIBA webpages (the Office of Insurance Commissioner's website) and from the MY SHIBA homepage.

SHIBA program staff receive and vet speaker requests and then often assign them to the SHIBA sponsor to coordinate in the county where the speaking request was requested. Speaking engagements are considered a Public Media Activity (PMA), which is a performance measure set in the sponsor's contract with SHIBA. Speaking engagements often result in CCRs, which also contributes to the sponsor's measurable performance set in their contract.

## Example – CMS/ACL slices

NOTE: ACL can change the "slice" designation from year to year.



| Performance Measure | Slice - County Group |
|---|---|
| PM1 - Total Client Contacts Per 1000 Medicare Beneficiaries | LCM - Large Central Metro |
| PM1 - Total Client Contacts Per 1000 Medicare Beneficiaries | LFM - Large Fringe Metro |
| PM1 - Total Client Contacts Per 1000 Medicare Beneficiaries | MM - Medium Metro |
| PM1 - Total Client Contacts Per 1000 Medicare Beneficiaries | SM - Small Metro |
| PM1 - Total Client Contacts Per 1000 Medicare Beneficiaries | MIC - Micropolitan |
| PM1 - Total Client Contacts Per 1000 Medicare Beneficiaries | OUT - Outside Metro-Micro |
| PM2 - Persons Reached-Enrolled Public Media Events Per 1000 Medicare Beneficiaries | LCM - Large Central Metro |
| PM2 - Persons Reached-Enrolled Public Media Events Per 1000 Medicare Beneficiaries | LFM - Large Fringe Metro |
| PM2 - Persons Reached-Enrolled Public Media Events Per 1000 Medicare Beneficiaries | MM - Medium Metro |
| PM2 - Persons Reached-Enrolled Public Media Events Per 1000 Medicare Beneficiaries | SM - Small Metro |
| PM2 - Persons Reached-Enrolled Public Media Events Per 1000 Medicare Beneficiaries | MIC - Micropolitan |
| PM2 - Persons Reached-Enrolled Public Media Events Per 1000 Medicare Beneficiaries | OUT - Outside Metro-Micro |
| PM3 - Substantial Personal Direct Client Contacts Per 1000 Medicare Beneficiaries | LCM - Large Central Metro |
| PM3 - Substantial Personal Direct Client Contacts Per 1000 Medicare Beneficiaries | LFM - Large Fringe Metro |
| PM3 - Substantial Personal Direct Client Contacts Per 1000 Medicare Beneficiaries | MM - Medium Metro |
| PM3 - Substantial Personal Direct Client Contacts Per 1000 Medicare Beneficiaries | SM - Small Metro |
| PM3 - Substantial Personal Direct Client Contacts Per 1000 Medicare Beneficiaries | MIC - Micropolitan |
| PM3 - Substantial Personal Direct Client Contacts Per 1000 Medicare Beneficiaries | OUT - Outside Metro-Micro |

# Section 7 - Outreach event planning

This addendum outlines the process for OIC SHIBA staff and sponsors to reference when planning or sub-contracting formal outreach events for SHIBA, such as the Welcome to Medicare birthday events.

### Medicare Birthday events:

Because it requires a significant amount of resources for a birthday event and direct-mailing campaign, scheduling an event is dictated by the availability of resources/budget.

The recommended timeline to establish a committee for this type of event is:

- December (for birthday)
- June (for birthday and Medicare Annual Open Enrollment events)

The committee will include the SHIBA:

- Program supervisor
- Field supervisor
- Grants and budget coordinator
- Regional training consultant(s) (RTCs)
- Volunteer coordinator(s) (VCs)

Based on the identified priority target areas, the committee will:

- Discuss outreach methods, such as direct mailing, radio, newspaper ads or social media.
- Determine which sponsors to request taking the lead for coordinating outreach events. Volunteer Coordinators typically take the lead coordinating outreach events when a sponsor is assigned an event. SHIBA may issue contract amendments for additional funding when a sponsor agrees to terms of event planning.
- Identify potential partners to contract events and/or distribute publications, such as senior centers and senior housing communities.
- Review SHIBA staff availability to speak at events.
- Develop a list of publications to use and include how many. Provide the list to the SHIBA communications consultant and the secretary senior to ensure publications are available and can be delivered in time for the event(s).

- Develop a preliminary budget including, but not limited to:
  - Contracting with community partners
  - Sponsor contract amendments for sponsor facilitated events
  - Light refreshments
  - Travel costs for speakers
  - Publications and materials
  - Direct-mailing design and printing (postcards, flyers)
  - Postage

## Sponsor-facilitated outreach event planning timeline - Four months prior to event

| TIMELINE - FOUR MONTHS PRIOR *MM/YY* | | | |
|---|---|---|---|
| RESPONSIBLE | | | |
| PROGRAMS SUPERVISOR | VC | RTC | TASK |
| X | | | DOL data review |
| X | | | Prioritize **targeted areas** |
| X | | | Develop preliminary budget with SHIBA grants and budget coordinator |
| X | | | Establish committee workgroup |
| X | | | Evaluate and determine the **communication methods** with committee and SHIBA communications consultant – event invitations, post cards, flyers, media advertisements |
| X | | | Check with SHIBA field supervisor and RTCs for availability to **speak/present** |
| X | | | Check availability of sponsors and volunteers for proposed event dates (speakers and counseling at events) |
| X | | | Initiate **contracting** with SHIBA grants and budget coordinator |
| X | X | | Research possible **facilities/venues**. Make sure facility/venue designed for scale of presentation, capacity, and accessibility for the anticipated attendees. Determine audio/visual needs and other equipment, such as easels. |

## Three months prior to event

| TIMELINE - THREE MONTHS PRIOR *MM/YY* | | | |
|---|---|---|---|
| RESPONSIBLE | | | |
| PROGRAMS SUPERVISOR | VC | RTC | TASK |
| X | | | Confirm the **budget** with the SHIBA grants and budget coordinator |
| X | | | Confirm **contracting** complete with sponsors and/or community partners |
| X | | | Finalize **communications methods** and design of direct mailings and event invitations with SHIBA communications consultant |
| X | | | Keep committee members and SHIBA staff informed of event planning updates (emails, network folder, Leadership meetings) |
| X | X | | Initiate **facility/venue** rentals/reservations, including the completion of the Barrier-Free Checklist (for state *and* non-state facilities) NOTE: Some facilities already have completed Barrier-Free Checklist on file at OIC - check with OIC Fiscal |
| X | | | Coordinate with SHIBA administrative assistant to prepare and follow through with non-state facility form approval, if non-state facility will be used (must attach completed Barrier-Free Checklist) |
| X | | | Coordinate with SHIBA administrative assistant to prepare and submit purchasing request for **facility/venue** (*must* include Barrier-Free Checklist - an Approved non-state facility form needs to be attached also, if applicable) |
| X | | | Communicate with sponsors in areas receiving direct mailings to prepare for increased client contacts |
| X | X | | Create list of supplies and publications needed for event |

| | | | |
|---|---|---|---|
| X | | | Coordinate with SHIBA secretary senior to place order for **supplies, publications, and signage** for timely delivery by event date |
| X | | | Confirm **facility/venue** reservation/rental, make sure OIC Fiscal has all required purchasing and barrier-free documentation |
| X | X | | Confirm availability of staff, sponsors and volunteers for proposed event dates to **speak/present** |
| X | X | | Communicate confirmed facility(ies) with confirmed **speakers/presenters** |

## Two months prior to event

| **TIMELINE - TWO MONTHS PRIOR *MM/YY*** | | | |
|---|---|---|---|
| **RESPONSIBLE** | | | |
| **PROGRAM SUPERVISOR** | **VC** | **RTC** | **TASK** |
| X | | | Confirm **budget** status with SHIBA grants and budget coordinator |
| X | X | X | Solicit volunteers to support event/provide on-site counseling, if necessary |
| X | | X | Coordinate and finalize **presentation** development or selection with SHIBA communications consultant |
| X | X | | Draft **agenda** |
| | X | | Submit event calendar requests for confirmed events to post to SHIBA event calendar; Submit calendar requests for confirmed events as early as possible |
| X | | | Verify **publications, materials and signage** order received or on target to be available |
| X | | | Keep committee members and SHIBA staff informed of event planning updates (emails, network folder, Leadership meetings) |

## One month prior to event

| TIMELINE - ONE MONTH PRIOR *MM/YY* | | | |
|---|---|---|---|
| RESPONSIBLE | | | |
| PROGRAM SUPERVISOR | VC | RTC | TASK |
| X | | | Confirm **budget** status with SHIBA grants and budget coordinator |
| X | X | | Finalize **agenda** |
| X | | | Confirm presentation topics with **speakers/presenters** and provide agenda |
| X | X | | Verify **publications, materials and signage** order received or on target to be available |
| | X | | Submit remaining event calendar requests for confirmed events to post to SHIBA event calendar |
| X | X | | Confirm volunteers to support event/provide **on-site counseling,** setup and/or clean up, if necessary |
| X | X | | Develop RSVP process |
| X | | | Initiate **mailing invites and direct mailing** |
| X | | | If **light refreshments** are paid by OIC directly, provide SHIBA administrative assistant a copy of the agenda to prepare Request for Light Refreshments; agenda must be submitted with the Request for Light Refreshments |
| | X | | If **light refreshments** are part of contract, the VC or community partner will coordinate light refreshments at the sponsor level |
| X | | | Coordinate with SHIBA administrative assistant to draft **customer satisfaction survey** in Survey Monkey |
| X | | | Keep committee members and SHIBA staff informed of event planning updates (emails, network folder, Leadership meetings) |
| X | X | | Coordinate handouts/packets preparation with volunteers, if necessary |

## Two weeks prior to event

| TIMELINE – TWO WEEKS PRIOR *MM/YY* | | | |
|---|---|---|---|
| **RESPONSIBLE** | | | |
| **PROGRAM SUPERVISOR** | **VC** | **RTC** | **TASK** |
| X | | | Confirm **budget** status with SHIBA grants and budget coordinator |
| X | X | | Verify **publications, materials and signage** order received/delivered to location |
| X | X | | Coordinate necessary equipment, i.e. laptop, projector, signage, as necessary |
| X | | | If OIC is paying for light refreshments, coordinate light refreshment purchase; determine if using purchasing card or getting reimbursed |
| X | | | Coordinate with SHIBA administrative assistant to finalize **customer satisfaction survey** |
| X | X | | Prepare sign-in sheet *with email field*; inform facilitator that sign-in sheets are required<br><br>NOTE: Completed sign-in sheets are required to complete light refreshment process for reimbursement if OIC pays directly; sign-in sheets are also required to follow-up with customer satisfaction survey |

## During event

Prepare sign-in sheets to include email address field.

| TIMELINE – DURING EVENT *MM/YY* | | | |
|---|---|---|---|
| RESPONSIBLE | | | |
| PROGRAM SUPERVISOR | VC | RTC | TASK |
| | X | X | Set up A/V with presentation |
| | X | X | Set up signage and publications, if necessary |
| | X | X | Set up counseling tables, if necessary |
| | X | X | Set up light refreshments, if necessary |
| | X | X | Make sure sign-in sheet is completed |
| | X | X | Break down and clean up |

## Promptly *after* event (within one – three business days)

| TIMELINE – AFTER EVENT *MM/YY* | | | |
|---|---|---|---|
| RESPONSIBLE | | | |
| PROGRAM SUPERVISOR | VC | RTC | TASK |
| X | X | | Complete PMA |
| X | X | | Turn in light refreshment receipts and completed sign-in sheet to SHIBA administrative assistant if SHIBA employee purchased/needs reimbursement |
| X | X | | Coordinate the completion of the Agency Certification (barrier-free) to be completed *not later than seven working days after the event* |
| X | X | X | Ensure narratives are coordinated for grant reporting |
| X | | | Coordinate with SHIBA administrative assistant to send out customer satisfaction surveys using sign-in sheet contact/emails |

## Two to three weeks *after* event

| TIMELINE – TWO TO THREE WEEKS AFTER EVENT *MM/YY* | | | |
|---|---|---|---|
| RESPONSIBLE | | | |
| PROGRAM SUPERVISOR | VC | RTC | TASK |
| X | | | Submit completed Agency Certification to Fiscal |

## Four to six weeks *after* event

| TIMELINE – FOUR TO SIX WEEKS AFTER EVENT *MM/YY* | | | |
|---|---|---|---|
| RESPONSIBLE | | | |
| PROGRAM SUPERVISOR | VC | RTC | TASK |
| X | | | Pull CCR and PMA reports from SHIBA Online |
| X | | | Coordinate with SHIBA administrative assistant to compile customer satisfaction survey results |
| X | | | Evaluate success of outreach event(s) using CCR and PMA reports and customer satisfaction survey results |
| X | | | Share success and lessons learned with SHIBA Leadership team and VC(s) |

## Example – Preliminary budget by event

| DESCRIPTION | ESTIMATED COST | APPROVED BY SHIBA PROGRAM MANAGER OR GRANTS/BUDGET COORDINATOR |
|---|---|---|
| Contracting:<br>- Facility costs/rental<br>- Travel<br>- Light refreshments | $500.00 | |
| SHIBA staff and/or volunteer travel | $900.00 | |
| Publications/materials (pens, notepads, bags) | $200.00 | |
| Direct mailing/ invitations - development and printing | $500.00 | |
| Postage | $3000.00 | |
| **ESTIMATED TOTAL:** | $5100.00 | |

## Example – Supplies and publications list for event

| DESCRIPTION | QUANTITY | AVAILABLE IN FULFILLMENT? | ORDERED |
|---|---|---|---|
| SHIBA general Brochure (SHP 858) | | | |
| Get help Paying for Medicare (SHP 849) | | | |
| Medigap plan chart (SHP 521) | | | |
| Stand-Alone Part D plans (SHP 839) | | | |
| Medicare Advantage plans (online only) | | | |
| Volunteer recruitment card (SHP766) | | | |
| SHIBA pens (SHS 1046) | | | |
| Notepads (SHS 989) | | | |

# Example – Justification for using a non-state facility form

**ADA ACCESSIBLE MEETING FACILITY CHECKLIST**

Justification for Using a Non-State Facility

**This form must be completed by the agency representative.**

Agency Name: Office of Insurance Commissioner

Agency Representative John Hamje
Deputy Insurance Commissioner

Activity Title Welcome to Medicare Outreach Event
*(Name of meeting, convention, conference, etc.)*

Justification for using a non-state facility:
This outreach event is a grant funding performance requirement. The event will be attended by no less than 100 Medicare-beneficiaries. The proposed location is the Norm Dicks Conference Center in Bremerton, Washington.

The Norm Dicks Conference Center is a large capacity venue Conveniently to the attendees that will be invited to receive Medicare Information and enrollment assistance. The facility complies with the American with Disabilities Act. The completed Barrier-Free Access Checklist is attached.

Agency Representative Approval ____________________
Agency Head Approval ____________________
Date ____________

# Example – Barrier-free access checklist (ADA checklist)

NOTE: Page 1 of 16 shown below. Full form is available on My SHIBA under Forms.

**Washington State Barrier-Free Access**
**Checklist For State Leased Facilities, New and Renewals**

**Universal Access** - Universal design or inclusive design is an approach to the design of products, services and environments to be as usable as possible by as many people as possible regardless of age, ability or situation. It links directly to the concept of an inclusive society, its importance is recognized by governments, business and industry.
**Integrated setting** - Examples: **1.** Entrances that have one path of travel for people w/ disabilities or those who are temporarily able. Use sloped incline rather than ramp and stairs. 2. In fixed seating areas, (auditoriums, theatres) provide accessible seating
throughout. Provide seating that does not obstruct views.

This checklist was developed by Real Estate Services (RES) with the assistance of the Governor's Committee on Disability Issues and Employment (GCDE), members of the disability community, and client agencies. This is a tool to help State government comply with requirements of the Americans with Disabilities Act Accessibility Guidelines (ADAAG), WAC 51-50, International Building Code (IBC) and ANSI 117.1.

It is important to note that meeting these checklist criteria will not, by itself, ensure that tenant agency programs, employment, and facilities are in full compliance with ADA and the other applicable laws. RES will assist tenant agencies in assessing and achieving program accessibility in leased facilities**, the tenant agency has ultimate responsibility for providing accessible services and programs.**

| | |
|---|---|
| RES Project #: | Agency/Div.: |
| SR&L # : | Bldg. Name: |
| Approx. Square Feet : | Bldg. Address: |
| | |
| Person w/ Disability assisted review?: ☐ **Yes** ☐ **No** | |
| Lead Surveyor : | Suite/Floor(s): |
| Lead Surveyor's Ph. : | City: |
| | Survey Date: |
| **Mandatory: Agency** - Please identify required accessibility level for this facility: | |

Level 1 ☐ (Serve the public) **or** Level 2 ☐ (Serves primarily w/ people w/ disabilities) is the minimum access Level Required For This Facility/Project
Describe any special requirements for this project: (Attach separate sheets if necessary)____________________
________________________________________________________________

**Definitions and Acronyms**

Access Levels: Description of Barrier Free Design features expected for leased space.
**Level 1:** houses public employees, does or does not provide on-site services.
**Level 2:** houses public employees, primarily provides on-site services to clients with disabilities. i.e. Division of Vocational Rehabilitation

Accessible Route: Continuous unobstructed path.

ADAAG/ABA: Americans with Disabilities Act Accessibility Guidelines/Architectural Barriers Act
Department of Justice (DOJ): "ADAAG is the standard that must be used for privately-owned public facilities under title III of the ADA.

WAC 51-50 Washington Administrative Code, has requirements (Amendments) unique to Washington State

IBC/ANSI117.1 International Building Codes, can use these, but must also comply w/ WAC 51-50 annnd ADAAG.

Measurements: measurement listed is exact minimum and max unless otherwise stated.

# Example – Agency certification

NOTE: The Agency Certification Statement is completed by the sponsor or partner contracted to facilitate an outreach event. The completed form is submitted to the Programs Supervisor promptly after the event. The form is then provided to OIC's fiscal office.

**ADA ACCESSIBLE MEETING FACILITY CHECKLIST**

Agency Certification Statement

**This form must be completed by the agency representative.**

Agency Name: Office of Insurance Commissioner

Agency Representative ______________________________

Activity Title ______________________________
(Name of meeting, convention, conference, etc.)

To the best of my knowledge, the non-state facilities provided to our agency by ______________________________
on ______________ **Did** ☐ **Did Not** ☐ Meet all of the Americans with Disabilities Act's minimum accessibility requirements as listed in the state of Washington Financial and administrative Policies, Regulations, and Procedures manual (Part 4, Chapter 3, Section 10, Subsection 1.6) prescribed by the Office of Financial Management.

If the non-state facilities did not meet the minimum accessibility requirements, please explain: ______________________________

______________________________

______________________________

______________________________

Agency Representative Approval ______________________________
Date ______________

# Example – Event agenda

NOTE: Agenda is required *with* the Request for Light Refreshments *if* refreshments are paid by OIC directly, i.e. not part of contract with sponsor or community partner.

Current agenda template can be found on My SHIBA under Resources

## SHIBA Outreach– Medicare Basics Presentation/Agenda

| | |
|---|---|
| **Date** | 02/01/2016 |
| **Time/Location** | 11:00 a.m. – 1:00 p.m., Nelson Manor Senior Apartments, Seattle, WA |
| | 1:00 p.m. – 2:30 p.m., Sunrise Manor, Seattle, WA |
| | 2:30 p.m. – 5:00 p.m., Schwabacher Apartments, Seattle, WA |
| **Facilitator** | Lori Wada, SHIBA Program Supervisor |

### Objective

Provide free, unbiased information about Medicare coverage and options to help improve the lives of Washington state residents.

### Agenda items

| | |
|---|---|
| **Basics of Medicare** | Present |
| **Medicare Options** | Present |
| **How to Enroll** | Present |
| **Q & A** | Discuss |
| **Closing/Sign up for one-on-one counseling appointments** | Open |

### Attendees

8 – 13 attendees have indicated interest for each presentation listed above. A sign in sheet will be completed at each outreach event .

NOTE: Sign-in sheet is required *with* the Request for Light Refreshments *if* refreshments are paid by OIC directly, i.e. not part of contract with sponsor or community partner.

Sign-in sheet template can be found on My SHIBA.

## Example – Event sign-in sheet

Meeting title: ____________________

Organization: ____________________

Date/Time: ____________________

Location: ____________________

Sign-In

| | Name (please print) | Zip Code | Email Address* (*optional*) | Phone Number (*optional*) |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
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| | | | | |
| | | | | |
| | | | | |

*OIC does not share email addresses.

Page _____ of _____

# Section 8 - Path to Certification

Once a prospective volunteer indicates an interest in the SHIBA Program, the Path to Certification process should be followed to ensure the proper screening and placement of the prospective volunteer. The Path to Certification ensures that the applicant is the right fit for the program and will not pose any risk to its clients, staff, or other volunteers. A word of caution, prospective volunteers should not wait for long periods of time before interviewing and placement or they may decide to go elsewhere.

The most current Path to SHIBA Certification can be found on My SHIBA.

## Path to SHIBA Certification

Becoming a certified SHIBA volunteer involves a multi-step process that you must complete before you can actually work with clients. Every step of the certification process provides unlimited support and assistance from SHIBA staff and other volunteers to the new volunteer. The chart below depicts the various steps a new volunteer must successfully complete to become a certified SHIBA volunteer.

| ✓ | # | Steps: | Actions: | Timing: |
|---|---|---|---|---|
| | 1 | Application | New volunteer completes application and passes background check | Background checks will be complete within 2 weeks |
| | 2 | Initial Interview | Volunteer Coordinator (VC) schedules interview with new volunteer and presents Volunteer Handbook | Scheduled by VC |
| | 3 | Basic Training | New volunteer completes SHIBA Basic Training Class (online or in-person) | Varies |
| | 4 | Requests Exam | • New volunteer requests to take exam from VC<br>• SHIBA Admin checks all paperwork and background checks before notifying the SHIBA Curriculum Developer (CD)<br>• CD sends link to new volunteer to take the exam | Varies (3 weeks to complete exam) |
| | 5 | Takes Exam | New volunteer submits completed exam to CD who reports results to all parties | 3 weeks after Basic Training |
| | 6 | Mentoring Training | New volunteer coordinates with trainer on dates available for the in-person training[1] | Any time after Basic Training |
| | 7 | Badge Photo | VC requests or takes picture of new volunteer and sends to SHIBA Secretary Senior | At anytime |
| | 8 | Shadowing | Volunteer meets with VC who assigns a mentor | Minimum 10 hours |
| | 9 | Role Assignment Discussion | During interview, VC works with volunteer to complete the Mentoring Checklist and discuss potential roles | Scheduled by VC |
| | 10 | Certificate Requested | VC sends in Mentoring Checklist to CD for volunteer file and notifies CD that volunteer has completed mentoring | After second interview |
| | 11 | Certificate Issued | CD prepares volunteer certificate and SHIBA Secretary Senior mails certificate and badge to Regional Training Consultant to present to new volunteer | Upon completing mentoring phase |
| | 12 | Certified Volunteer Begins Working With Clients | | |
| | 13 | Certified Volunteer Attends all Required Monthly (Update) Trainings | | |

[1] Mentoring training will be available sometime in 2016. Please skip step until further notice and continue mentoring as noted in step #8.

**Effective as of January 15, 2016**

# Certification Exam

| A. HOW TO REQUEST A SHIBA VOLUNTEER CERTIFICATION EXAM | |
|---|---|
| Volunteer coordinator (VC) submits request to training coordinator (or delegate) for certification exam and provides the following:<br>• Volunteer advisor name<br>• Date Basic Training was completed<br>• Basic Training completed in-person *or* online<br>• Volunteer's email address*<br><br>NOTE to Training coordinator (or delegate): This is opportunity to ensure volunteer's email address matches what is in volunteer's SHIBA Online resource record and SHIP NPR profile and resolve any discrepancies. | **VOLUNTEER COORDINATOR AND TRAINING COORDINATOR** |
| **B. CERTIFICATION EXAM ISSUED** | **ROLES** |
| 1. Training coordinator ensures volunteer application process is complete by referencing the volunteer tracking spreadsheet.<br><br>2. Training coordinator (or delegate) registers volunteer in SHIP TA Center if not done already.<br><br>3. Once registered, training coordinator (or delegate) schedules volunteer for the SHIBA Basic Training Exam.<br><br>4. Training coordinator (or delegate) emails volunteer with instructions to access certification exam via email (see email format below).<br><br>*** (beginning of email instructions to volunteer)<br><br>*Dear [Volunteer Name]:*<br><br>*Congratulations on completing SHIBA Basic Training! You are ready to take your certification exam.*<br><br>*Please follow the instructions below to access the SHIBA volunteer certification exam.*<br><br>*Go to SHIP TA Center: https://www.shiptacenter.org/*<br><br>*Log in using your email address*<br><br>*Password is: Shiba123!*<br><br>*NOTE: You are encouraged to reset your password as soon as possible. Use the 'Forgot your password?' link under the 'Login' button.* | **TRAINING COORDINATOR** |

| | |
|---|---|
| *Once logged in, select 'Counselor Training' near top of screen.*<br><br>*Select 'Counselor Training and Certification' in green box at bottom of screen.*<br><br>*Then select 'Certification Tool' at the top of the screen.*<br><br>*Select 'Take Exam' to right of 'SHIBA Basic Training Exam'.*<br><br>*After completing all 36 questions, select 'Submit' at the bottom of screen.*<br><br>*TIP:*<br><br>*You may exit or log out of an incomplete exam, log back in, and resume where you left off. DO NOT select 'Submit' to exit out of an incomplete exam. To log out, select 'Home' at the top left of the screen. The 'Logout' button will then be at the top right of the screen. You may resume the exam where you left off once you log back in to SHIP TA Center and follow the instructions above again.*<br><br>*Email shiba@oic.wa.gov if you have trouble accessing the exam.*<br><br>*AFTER THE EXAM:*<br><br>*A passing score is at least 29 correct answers out of 36 (or 80%). Reply to this email when you have completed the certification exam. The Training coordinator (or delegate) will advise you of next steps according to the results.*<br><br>*PATH TO CERTIFICATION:*<br><br>*You may reference the Path to Certification on My SHIBA. Your Volunteer Coordinator can provide you the password to My SHIBA if you do not have it already.*<br><br>*** (end of email to volunteer)<br><br>5. Update volunteer tracking spreadsheet with:<br><br>- Basic training date<br>- Date exam issued | |
| **C. AFTER THE EXAM IS COMPLETE** | **ROLES** |
| 1. Send email to training coordinator or shiba@oic.wa.gov when exam is complete and submitted. | **VOLUNTEER** |

| D. VERIFY AND RELEASE EXAM RESULTS | ROLES |
|---|---|
| 1. Upon notification an exam is complete, the training coordinator (or delegate) verifies results in SHIP TA Center.<br>• Pass (at least 29 correct out of, or 80%)<br>• Fail (28 or less out of 36 correct)<br>2. Training coordinator emails results and next step in the Path to Certification to:<br>• volunteer advisor<br>• volunteer coordinator<br>• regional training consult<br>3. Training coordinator updates the volunteer tracking spreadsheet.<br>NOTE:<br>The exam may be attempted three times. Training coordinator will re-schedule the exam in SHIP TA Center and re-issue upon request and update the volunteer tracking spreadsheet | **TRAINING COORDINATOR** |
| 4. Volunteer coordinator and volunteer advisor review next steps for the Path to Certification. | **VOLUNTEER COORDINATOR AND VOLUNTEER** |

# Mentoring Checklist

The most current Mentoring Checklist can be found on My SHIBA under Basic Training.

## SHIBA Volunteer Coordinator's Mentoring Certification Checklist

**Volunteer Name:** ______________ **Volunteer Coordinator:** ______________

**Sponsor:** ______________________________________________

**Date:** ____________________ **SHIBA Mentor:** ____________________

| | Preparation Completed by: Volunteer Coordinator | Date | VC's Initials |
|---|---|---|---|
| ☐ | Volunteer application has been completed and submitted to VC | | |
| ☐ | Volunteer background check has been completed | | |
| ☐ | Volunteer has completed Basic Training | | |
| ☐ | Volunteer has taken and passed SHIBA Certification Exam | | |
| ☐ | Volunteer has taken the Mentoring Training[1] | | |
| ☐ | Volunteer observes 10 hours of counseling sessions lead by an experienced volunteer | | |
| ☐ | Volunteer can demonstrate using SHIBA Online (CCRs, PMAs, timesheets, etc.) on their own or on paper form if applicable | | |
| ☐ | Volunteer understands how client calls are assigned and the turn-around time for responding to a client's call | | |
| ☐ | Volunteer does not use a computer | STOP HERE | |
| ☐ | Volunteer is able to successfully maneuver on the OIC website | | |

[1] Mentoring training will be available sometime in 2016. Please skip step until further notice and continue mentoring as noted in next step.

Note: Once completed, please mail back to the OIC for office use.
Attn: Cortney Melton – SHIBA
PO Box 40255
Olympia, WA 98504 CM 1/15/16

*Reference*:
SHIP Volunteer Program Management Manual -
Chapter 6 – Training Volunteers for Success

# Section 9 - Protecting client information

## Client Contact Records (CCRs)

The majority of records and paper forms are entered into the SHIBA Online database. It's the volunteer coordinator's responsibility to ensure volunteers submit CCRs or other materials with confidential client information to the sponsor organization promptly for destruction after data is entered in SHIBA Online.

Securing client confidential information should be discussed frequently with volunteers to ensure there is a firm understanding to safeguard confidential client information.

## Discussing counseling scenarios

Due to the sensitive nature of both the health and financial information clients share with us, it's critical we protect our clients' personal information. This means not only safeguarding written and electronic documents, but also not divulging names and individual identifying characteristics about our clients during conversations with our peers, family, friends or the public.

Everyone who is part of the SHIBA network is responsible for maintaining the confidentiality of all proprietary or privileged information. This includes information involving a single staff member, volunteer, client, or other person involving overall OIC/SHIBA business. Only the SHIBA program manager has the authority to share personal client information with the public under the guidance of OIC's information and governance manager.

## Client counseling approach regarding confidential personal information

No individual information whatsoever about a current or past client should be shared with anyone unless it is directly related to the client's service needs and with verbal consent of the client. When a volunteer works with a client, an unspoken understanding exists between the volunteer and the client that other organizations may be contacted. In cases where volunteers must share information with other entities to provide service, the client should be made aware when their information will be used and with which organization(s). If the client does not want their name shared (i.e. in connection with a complaint), note it in the complaint case notes on the CCR. Clients can be advised that not providing contact information may hamper in-depth review or investigation.

When discussing particular cases with regional training consultants (RTCs), volunteers, or other staff, be careful not to reveal the client name or any other identifying information. Even the fact that SHIBA has or has not provided service to a client should not be disclosed. When client information is shared with another entity that may assume some responsibility for resolving the case, the name of the volunteer assisting the client is also kept confidential and used only by the investigator or staff within the OIC to gather additional clarifying information.

**Consent to disclose**

In general, SHIBA volunteers and staff are not required by law to use signed release forms to disclose information. However, there are exceptions to this rule. When disclosing the following information, state and/or federal law requires the written consent of the client.

- Drug and alcohol abuse treatment information
- Sexually transmitted disease information (including HIV/AIDS)
- Mental health information

Consent must specifically mention this information; a general authorization to release information is not sufficient. This consent can be revoked by the client at any time. Furthermore, written consent is required from a minor, age 13 and above, to disclose information about drug and alcohol use, abuse, and treatment; sexually transmitted diseases (including HIV/AIDS); mental health conditions; and pregnancy termination. Also if another entity requests a signed consent form, volunteers can request one and ask the client to sign it.

**Data capture and case notes**

You may include highly sensitive personal information such as Medicare numbers, plan numbers, medical conditions, medication lists, or client income in case notes and enter it into the SHIBA Online database. Include this information only if it's directly relevant to the case at hand and it's needed to resolve the case fully. If this information is not required to resolve a case, do not include it.

**Safeguarding volunteer and client data**

The following steps should be taken to reduce the possibility of identity theft:

Maintain up-to-date Volunteer Resource Records in SHIBA Online

- Report deactivated volunteers promptly to shiba@oic.wa.gov. Deactivated volunteers no longer have access to SHIBA Online database.
- Do not share SHIBA Online passwords.
- Do not use the "remember me" function to automatically enter passwords.
- Keep passwords in a safe place.

- Shred all case notes and other client information as soon as the case is entered into SHIBA Online and closed. All shredding/destruction should be done by the sponsor organization vs. volunteers doing it on their own. A strict protocol should be in place to ensure client information is destroyed from further use.

# Section 10 – Publications and Media Policy

## Publications

For quality-control purposes and statewide consistency, you may only distribute SHIBA-related publications to the public that the OIC has produced and approved. The OIC's SHIBA communications consultant is responsible for all SHIBA publications, including content, format, style, and quality and effectiveness of publications. The overall goal is to increase the visibility and recognition of the OIC and to manage production costs and potential agency liabilities.

The SHIBA communications consultant writes and edits all SHIBA publications in partnership with a team of OIC Subject Matter Experts (SMEs). The SMEs are responsible for providing the communications consultant with accurate technical content for publications. SHIBA encourages all sponsors and volunteers to provide input on existing publications or propose new publications to the SHIBA communications consultant or their regional training consultant.

The SHIBA curriculum developer writes and edits volunteer training materials. The curriculum developer also works with our subject matter experts to ensure our training materials are accurate. We also consult with expert volunteers during the curriculum development process.

## SHIBA advertising request form

**Media**

Before publicly communicating SHIBA program information or advertising to the media or press, sponsor and/or volunteer coordinators must contact the SHIBA communications consultant.

Whether you plan to create your own SHIBA-related news releases, public service announcements, advertisements or news articles, you must obtain review and approval at least 10 business days in advance from the SHIBA communications consultant.

For newspaper or radio ads, you'll need to thoroughly fill out the online SHIBA advertising request form at least 10 business days in advance. The online form is available on the My SHIBA website.

## Outreach materials

SHIBA offers sponsors a variety of outreach materials that the OIC has produced and approved, such as posters, cards, cube pads, bags, etc., for use in outreach activities. These items are available for free by ordering through Fulfillment at the Dept. of Enterprise Services.

**If you create your own SHIBA-related outreach materials, you must seek review and approval** at least 20 business days in advance from the SHIBA communications consultant.

## Order publications and outreach materials

Instructions to order publications can be found at My SHIBA/Publications. Order SHIBA publications through the Dept. of Enterprise Services.

You can find a catalog of available SHIBA publications at: My SHIBA/SHIBA Publications.

Please do not keep large quantities of publications as we want to ensure we are not distributing outdated publications.

## News Flash

News Flash is an electronic newsletter that provides information about changes in current law or updates pertinent to your role in counseling consumers. News Flash is maintained by SHIBA staff, but volunteers and sponsors are encouraged to contribute items. This news is also of interest to local agencies and other community partners. To subscribe to receive News Flash updates via email, contact the SHIBA communications consultant.

# Section 11 – Records Management

## Volunteer records

The SHIBA program office maintains confidential hard copy personnel records of each volunteer. Volunteers are asked to notify their Volunteer Coordinator of any changes in contact information (i.e., emergency contact information, home address, telephone number, email address, etc.). Once the volunteer notifies the Volunteer Coordinator of changes, it's the volunteer coordinator's responsibility to ensure the volunteer's resource record in SHIBA Online is updated.

**Volunteer records maintenance**

SHIBA staff maintain records on each SHIBA volunteer that has been activated in SHIBA Online as a resource.

Volunteer files include:

- Volunteer application, including Background Authorization
- WSP Background Check
- SHIBA Online Resource Record
- Volunteer Agreement
- Mentoring Checklist
- SHIBA Volunteer Certificate
- Any corrective action plans or other correspondence

Volunteer Coordinators are responsible for submitting applications, mentoring paperwork, and corrective action plans to the SHIBA program office in a timely manner. Other items that can be provided for the volunteer files are evaluations, commendations and awards from the sponsor organization or the public.

## Public disclosure requests

From time to time, OIC and SHIBA receive formal Public Disclosure Requests (PDRs) from individuals and entities. These requests must be made in writing to the OIC Information and Governance Manager who then notifies the SHIBA Program Manager of the request. Extreme care is taken to release only the minimum information necessary by law and only to satisfy the purpose of the request. In some cases, information may be redacted from the document requested. If this occurs, the OIC must provide a legal justification to the requester as to why we omitted the information. Requests for information for commercial purpose are against the law and the OIC will deny those requests.

Volunteer contact and other information is considered the same as paid staff information so it's exempt from public disclosure in most cases. Volunteer names, however, may be shared. In cases of legal subpoenas, SHIBA must operate within the law and must provide whatever information is required.

See Protecting Client Information.

# Section 12 - Recruitment

Volunteers are recruited by the sponsor on a pro-active basis, with the intent of broadening and expanding the volunteer involvement of the community. They are recruited without regard to gender, sexual orientation, disability, age, race or other condition. The sole qualification for volunteer recruitment is suitability to perform a task on behalf of the OIC. Volunteers may be recruited through either an interest in specific functions or a general interest in volunteering that will later be matched with a specific function. A volunteer position description should be in place before an applicant is engaged in service.

Finding the right people to volunteer is often the most challenging task of a volunteer coordinator. It's for this reason that having a plan in place for volunteer recruitment is essential. The recruitment campaign should contain clear, accurate and attractive information that appeals to the specific type of person needed for the program. Appeals to the general public for a general need are not as effective as materials and messages focused for a specific target audience.

| | **Born** | **Population** |
|---|---|---|
| **Traditionalists (Silent generation)** | 1922 – 1945 | 75 million |
| **Baby Boomers** | 1946 – 1964 | 80 million |
| **Generation X** | 1965 – 1980 | 45 million |
| **Millennials (Generation Y)** | 1981 – 1999 | 76 million |

| **Traditionalists** | **Boomers** | **Generation X** | **Millennials (Generation Y)** |
|---|---|---|---|
| Practical | High functioning teams | Skeptical | Hopeful, optimistic |
| Always at work | Collaborative | Confident | Unwillingness to commit |
| Patient, loyal, hardworking | Objective sense of right and wrong | Independent | Meaningful work |
| Have difficulty with change | Ambitious | Adaptable to change | Moral mindset |
| Respectful of authority | Goal oriented | Want immediate gratification | Social activism |
| Rule followers | Impact is important | Risk-taking | Subjective view of reality |
| Rewards later | | Want recognition | Value diversity |
| Prefer structure | | Balance work and life | Value change |
| | | | Globally connected and technology is critical |

**Tips for effective volunteer recruitment**

*Traditionalists*: Talk about history and the future. Tell them how they can help your clients.

*Baby Boomers*: Emphasize organizations value and people focus. Communicate how they can contribute to service.

*Generation X*: Talk about creative environment. Offer diverse work experiences. Emphasize future plans and how they can contribute to them.

*Millennials*: Provide opportunities to learn new things. Provide diverse work experiences. Mentor them.

**Recruitment and interview checklist**

- Be engaging – use your imagination.
  - Market the significant impact and fun volunteers have.
  - Find new places to promote volunteer opportunities.
- Be specific about the roles you have to fill, the time commitments involved, and the qualifications required to be a volunteer.
- Offer ongoing, short term, and one-time volunteer opportunities.
  - Plan these in conjunction with your overall volunteer needs and roles.
  - Make sure that prospective volunteers understand all requirements and commitments and that they can make it work.
- Delegate contacts with perspective volunteers.
  - Identify other people who can make some of your strategic contacts.
  - Have a computer-savvy volunteer identify and update internet listing opportunities.
  - Take volunteers with you on speaking engagements so they can speak about their own experiences as volunteers.
- Seek out groups of people and approach qualified individuals.
  - Large groups save time.
  - Most people respond well to personal invitations that recognize their capabilities.
  - Keep regular contact with your local community partners.

Volunteers want to:

- Meet your needs so be upfront about your needs
- Have flexibility
- Use their skills
- Make an impact
- Work with colleagues
- Have their time limits respected

## Recruiting minors

SHIBA is a great place for teenagers to learn about the work environment while making a contribution to their community. Volunteers under age 18 are welcome, but must have the written consent of a parent or guardian prior to volunteering. This consent is included as part of the volunteer application. The volunteer tasks assigned to a minor should comply with all appropriate requirements of child labor laws and should be appropriate to their maturity level. Also, adequate supervision and support should be provided.

*Reference:*
SHIP Volunteer Program Management Manual -
Chapter 4 – Recruiting New Volunteers

# Section 13 – Reference checks

Volunteers are asked to submit three character references on the volunteer application form. References may be current or past employers, friends, volunteer supervisors, or other reliable sources. You should contact each character reference provided. Be sure to place the results of the reference check documents in the volunteer's file. Volunteers should be told in advance of the intention to make reference checks. If they refuse permission and cannot provide an acceptable reason, they cannot be placed as a SHIBA volunteer.

Reference checks have proven to be a reliable screening mechanism. Their effectiveness, however, depends largely on the reference checker's commitment to the reference check process. It is important the reference checker take the role seriously to protect clients and clients' identities.

## Background checks

Background checks are required for new volunteers (after February 2006). Background checks are a part of the Volunteer Application Process. Copies of background checks completed by the sponsor will be submitted to the SHIBA program office with the Volunteer Application Packet.

NOTE: Background check results provided by the sponsor can be accepted if they comply with Child/Adult Abuse Information Act (RCW 43.43.830 through 43.43.845).

Background checks are required for existing volunteers that were activated prior to February 2006 when they request a Medicare Unique ID.

The SHIBA program office will notify the volunteer coordinator when background check results are unsatisfactory. It is the volunteer coordinator's responsibility to inform the prospective volunteer the results of their background check.

*Reference:*
SHIP Volunteer Program Management Manual -
Chapter 4 – Recruiting New Volunteers

# Section 14 – Senior Medicare Patrol (SMP) Volunteers

NOTE: This section is for SHIBA sponsors who receive SMP grant funds through the SHIBA Program.

## How volunteers contribute to SMP

SMP volunteers add value in a number of ways to **prevent**, **detect**, and **report** Medicare fraud and abuse.

### Volunteers allow the SMP to reach and serve a wider population

In these days of increasing budgetary restrictions, volunteers allow the SMP to serve a wider audience, reaching out across states and communities to those who could not otherwise be served. The hours of service given by volunteers represent an invaluable resource to the SMP. SMP volunteers have served well over a million hours since the SMP program's inception in 1997. Each year, an average of 5,000 people serve their communities as SMP volunteers.

### Volunteers allow the SMP to speak directly and effectively to Medicare clients

Medicare clients make up the predominant volunteer demographic within most SMP programs, although there is no ban against recruiting other age groups. When Medicare clients volunteer with the SMP, peer communication networks are established. These SMP volunteers readily understand the concerns and issues of other Medicare clients.

### Volunteers allow the SMP to serve more diverse audiences

SMPs that involve volunteers who represent a cross section of their communities are better able to form relationships and assist many populations that are often overlooked. SMP volunteers can provide assistance in translating the SMP message into other languages and in maintaining credibility with audiences that are often skeptical of government messages. Volunteers can also bring a range of skills that may not be possessed by paid staff and may allow the SMP to build support from the community by acting as informal ambassadors who carry the message of the SMP to their friends and neighbors.

## How to enroll an SMP volunteer

Coordinate with your SHIBA regional training consultant if you have any volunteers interested in becoming a Subject Matter Expert (SME) on SMP.

# Section 15 – SHIBA Online

## SHIBA Online Access

**SHIBA sponsor staff**

Sponsor staff (in-kind) can receive login credentials for SHIBA Online upon submitting a completed SHIBA Online Resource Record. *The SHIBA Online Resource Record* form is located within the SHIBA Volunteer Application Packet.

**SHIBA volunteers**

See Volunteer Application Process.

**Email addresses**

Email addresses provided on the *SHIBA Online Resource Record* form need to be unique for each resource (sponsor staff, volunteer coordinator, volunteers). Emails are used to reset forgotten or lost passwords in SHIBA Online. It is important that email addresses for resources are unique, legible, and accurate on the *SHIBA Online Resource Record* form.

**Security access levels**

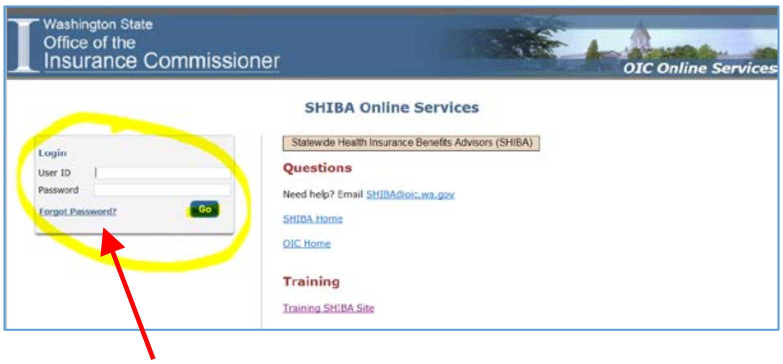
- **View**
  - Resource can view CCRs created within their assigned sponsor(s) organization.
- **Volunteer**
  - Resource can create their own CCRs and view CCRs created within their assigned sponsor(s) organization.
- **Sponsor administrator**
  - Resource can create CCRs and assign to any resource within their assigned sponsor organization.
  - Resource can pull reports under *Reports* tab.

Volunteer coordinators are automatically assigned as *Sponsor Administrator*.

Volunteers will automatically be assigned as *Volunteer* unless otherwise indicated by the volunteer coordinator on the *SHIBA Online Resource Record*.

## Logging in to SHIBA Online

When SHIBA staff set up a resource profile, login credentials are automatically emailed to the volunteer.




## Lost or forgotten passwords/user ID

When a password is lost or forgotten, select *Forgot Password* from the login page to receive an email with a temporary password.

The volunteer should contact the volunteer coordinator when a User ID is lost or forgotten. If the volunteer coordinator cannot resolve the access issue, the volunteer can email shiba@oic.wa.gov and request assistance.

Note: The User ID is needed to request a lost password. The current email address needs to also be included in the SHIBA Online Resource Record.

## SHIBA Online training site

To practice using the SHIBA Online database, use the online training site in My SHIBA. Login credentials are the same.

NOTE: If volunteer coordinator or volunteer recently changed their login credentials they may need to use the prior credentials until the system replicates the new credentials into the training site. The system updates every Sunday night.

The web address for the training site is:

https://fortress.wa.gov/oic/shibaonlinetraining/Login.aspx?module=SHB

# Client Contact Records (CCRs)

**Sponsor performance**

CCRs are captured in SHIBA Online.

SHIBA sponsor organizations receive payments based on the number of SHIBA clients who received substantial counseling for Medicare or other health insurance or needs.  It's important that a CCR is created, the client assisted, and the CCR is closed for each SHIBA client contact so sponsors can meet their performance tiers.

*Pending* and *Open* CCRs do not count towards contract performance tiers.  A closed CCR represent the client was contacted and counseled or information provided, including referral to another agency, such as the Health Benefit Exchange, Social Security Administration, etc.

**CCR entry timelines**

CCRs should be completed during the counseling session directly into SHIBA Online.  The counselor can use paper CCRs when he or she does not have access to a computer.  Sponsors are encouraged to enter CCRs that were completed on paper into SHIBA Online as soon as possible so the status is current (open or closed).  It's helpful for other volunteers or SHIBA staff to know the current status of the client, in case the client calls OIC for another referral or follow up.

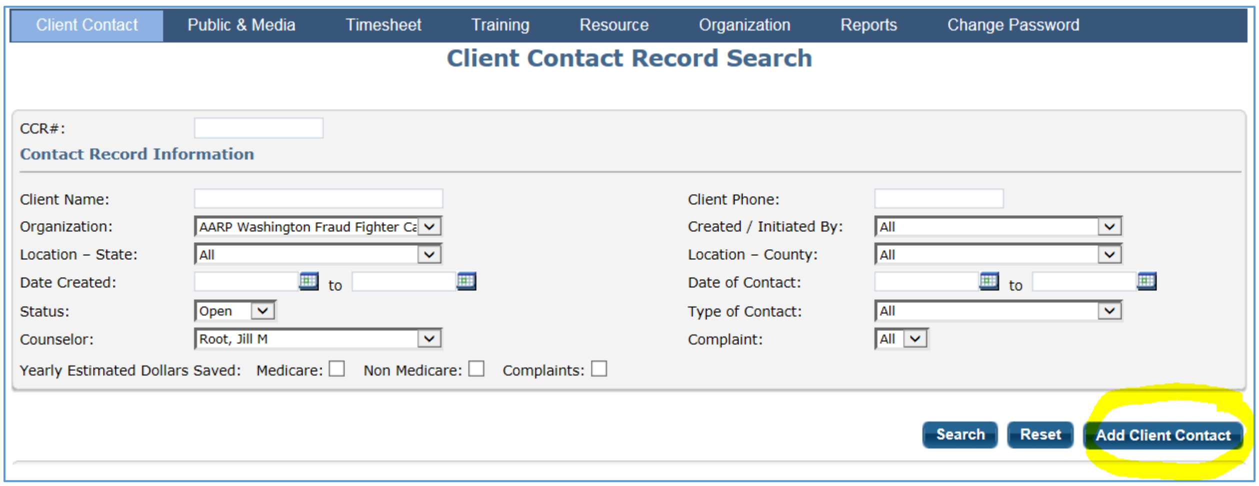
CCRs need to be entered into SHIBA Online no later than the $10^{th}$ business day following the end of each month.

# Instructions to enter CCRs in SHIBA Online

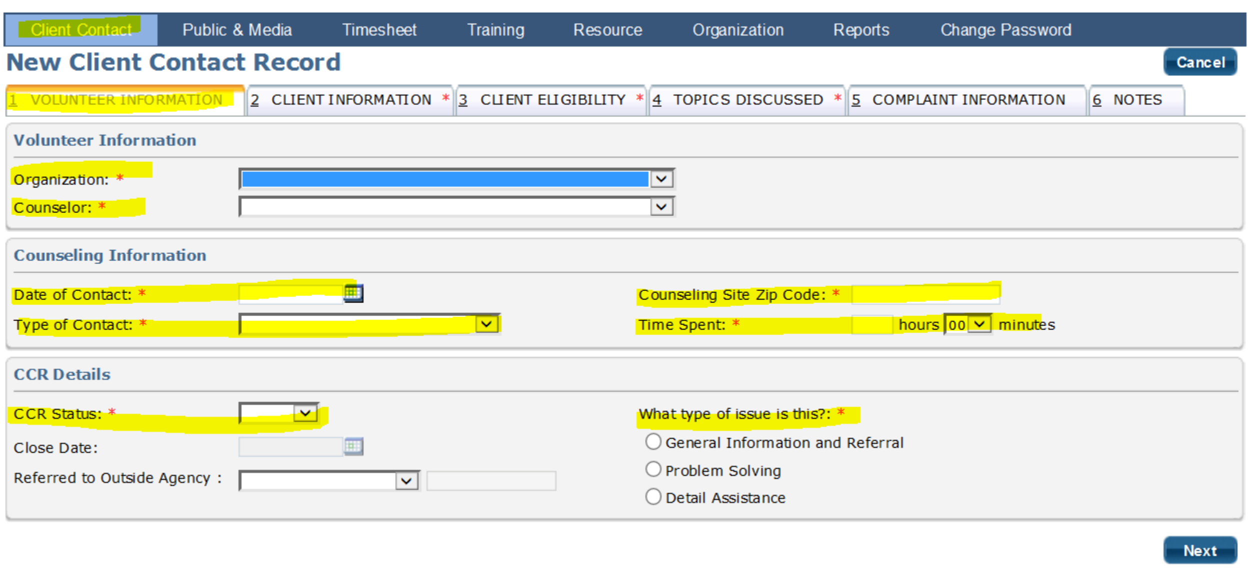
Login to SHIBA Online.

Once logged in, SHIBA Online opens up to the *Client Contact Record Search page*.

Select *Add Client Contact* at the bottom right.

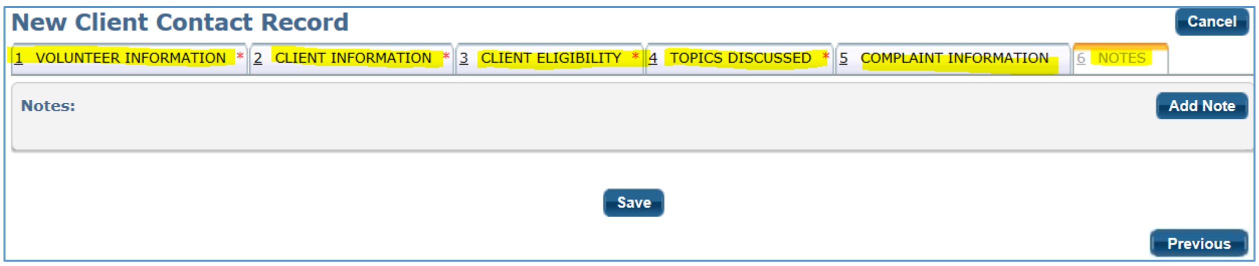



The next screen will open the *Volunteer Information* tab by default. All fields with a red asterisk (*) are required fields. You cannot save a CCR unless all required fields are completed. CCRs saved without a close date will show as Pending or Open.



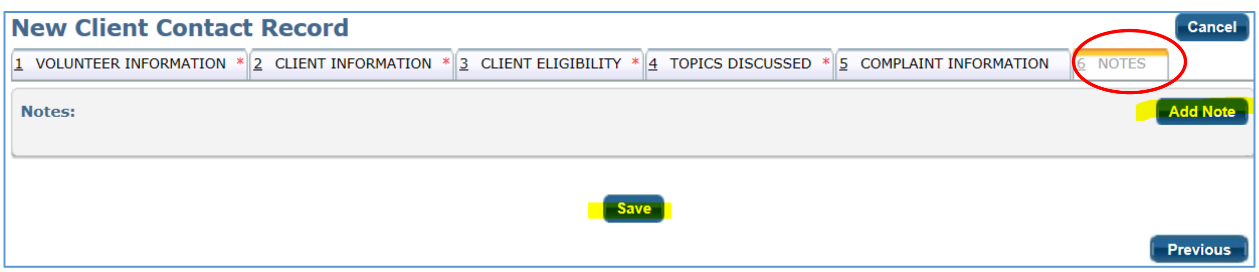
Note: Travel and driving time to and from a counseling session should be captured under *Time Spent* on the *Volunteer Information* page.

After the available information is entered on the *Volunteer Information* page, click *Next* at the bottom right or select the desired tab to continue entering information into the CCR.




## Saving a Client Contact Record (CCR)

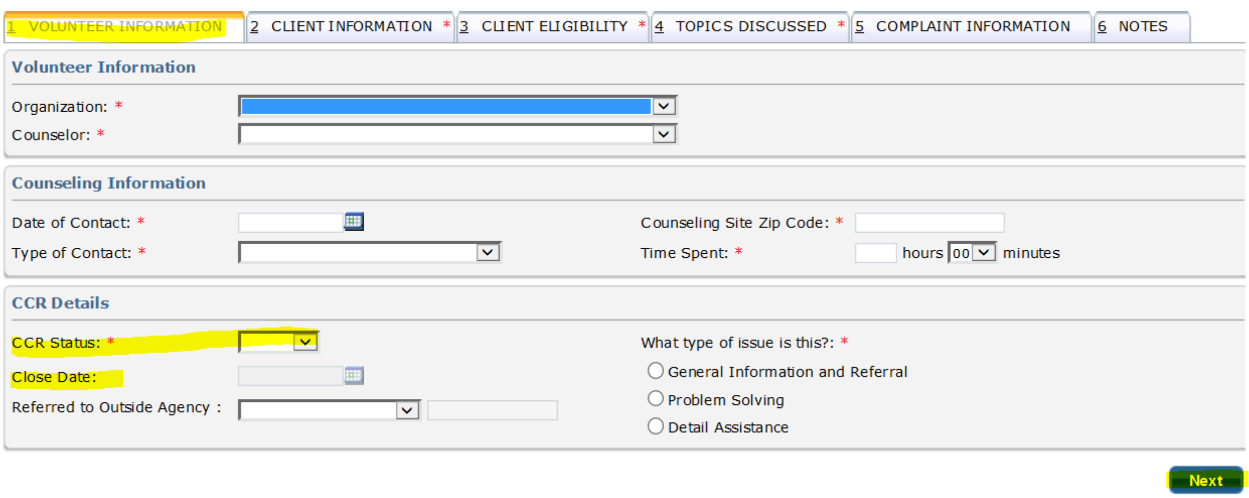
To save the CCR, go to the *Notes* page, enter any notes that may be helpful for reference by another counselor, and select *Save*. The CCR will not be closed until all required fields on each tab are completed and the *Close Date* is entered on the *Volunteer Information* page. You can save a CCR without a close date as long as you complete all the required fields. The CCR will show as Open or Pending if there is no close date. <u>Remember, Open and Pending CCRs do not count toward sponsor performance.</u>



# Closing a Client Contact Record (CCRs)

The CCR is closed when the client has been contacted and their inquiry(ies) have been addressed.

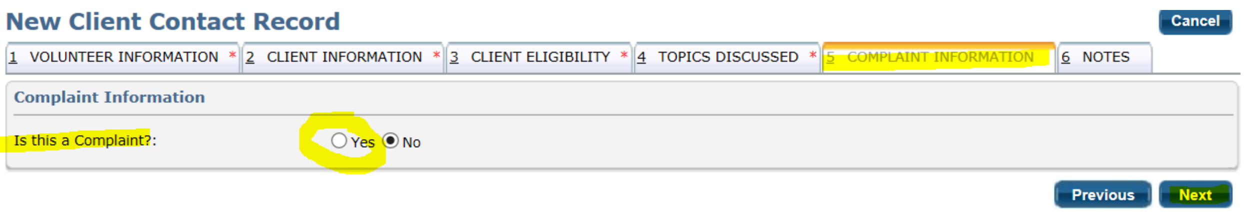
The *Close Date* will automatically fill in with the current date if *Closed* is selected for the *CCR Status*.



# Entering complaints (CCRs)

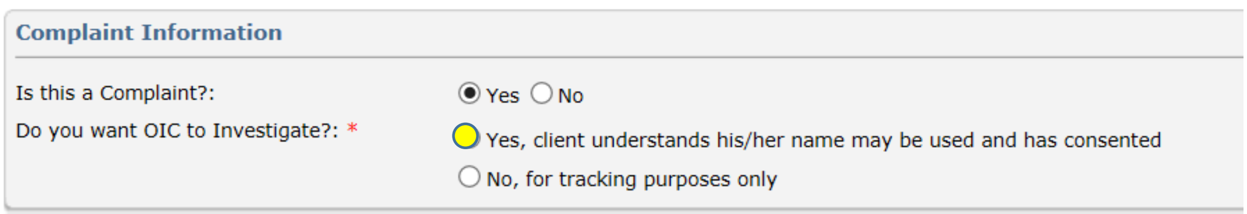
Complaint referrals are initiated on the *Complaint Information* tab when a CCR is created.

Select *Yes* and then *Next*.




The next window begins with documenting whether the client wants OIC to investigate.

<u>If *Yes*, it is important to remember to *Close* the CCR</u> when all required and available information is entered. The system will not forward the CCR complaint to SHIBA staff for follow up if a CCR complaint is not closed.

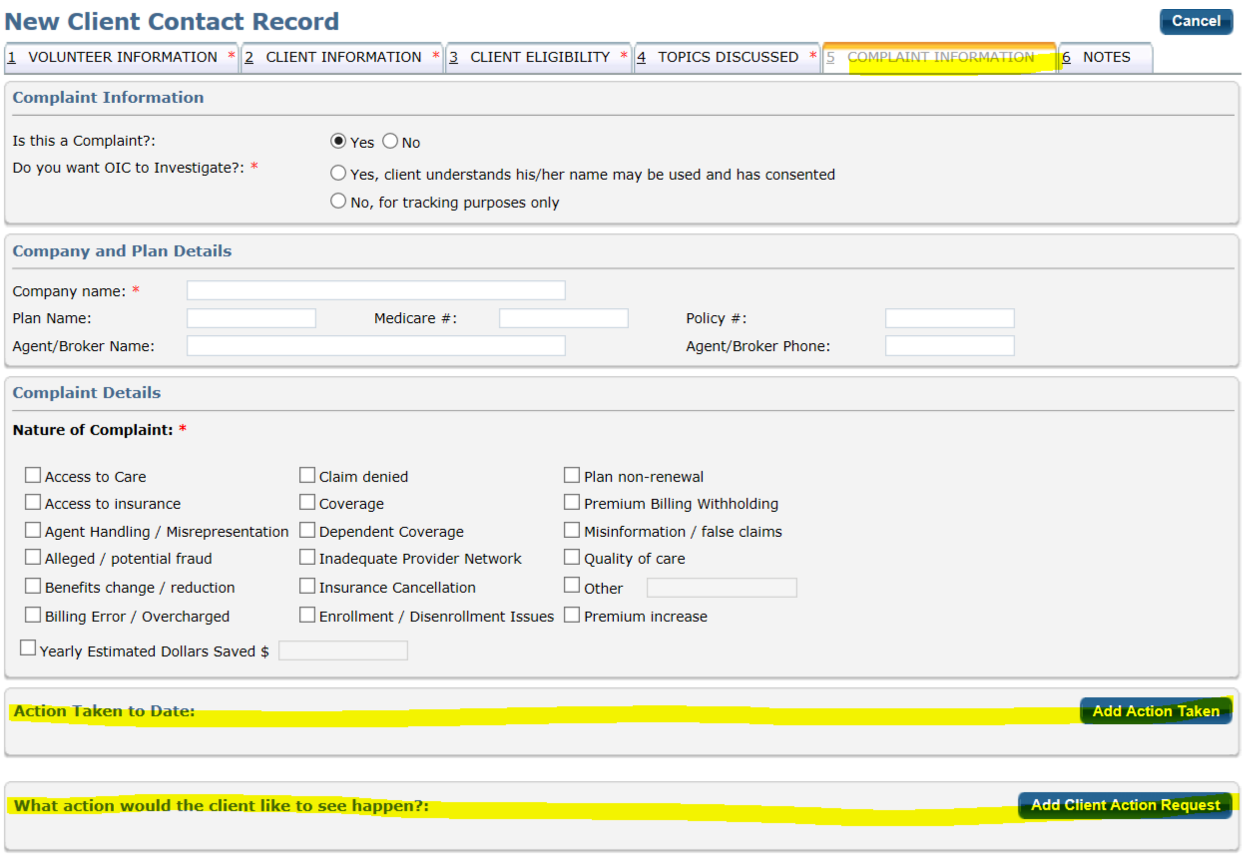



The rest of the complaint is documented further down the *Complaint Information* page as follows. Please encourage volunteers to complete the *Add Action Taken* and *Add Client Action Request* windows.

**Medicare Advantage, Part D complaints**

Before marking a complaint for follow up, the volunteer needs to ensure the client has gone through the plan's/provider's appeal process. Each plan will have its own appeals process. Clients must initiate the appeal with their plan on their own. Pursuing the plan's appeal process often resolves misunderstandings and billing errors between the plan and the client.

Unsatisfactory results of appeals can be noted under *Add Action Taken* to expedite and strengthen the basis for the complaint. SHIBA staff will refer the complaint to the appropriate state/federal agency on behalf of the client. The client will receive a letter from SHIBA to confirm the complaint was referred to an outside agency. The client will also be contacted by the outside state/federal agency or the plan/provider to acknowledge the receipt of the complaint. SHIBA does not have any authority once complaints are referred to an outside agency.



New Client Contact Record

Cancel

1 VOLUNTEER INFORMATION * | 2 CLIENT INFORMATION * | 3 CLIENT ELIGIBILITY * | 4 TOPICS DISCUSSED * | 5 COMPLAINT INFORMATION | 6 NOTES

**Complaint Information**

Is this a Complaint?: ◉ Yes ○ No

Do you want OIC to Investigate?: * ○ Yes, client understands his/her name may be used and has consented ○ No, for tracking purposes only

**Company and Plan Details**

Company name: *

Plan Name: Medicare #: Policy #:

Agent/Broker Name: Agent/Broker Phone:

**Complaint Details**

**Nature of Complaint:** *

| | | |
|---|---|---|
| ☐ Access to Care | ☐ Claim denied | ☐ Plan non-renewal |
| ☐ Access to insurance | ☐ Coverage | ☐ Premium Billing Withholding |
| ☐ Agent Handling / Misrepresentation | ☐ Dependent Coverage | ☐ Misinformation / false claims |
| ☐ Alleged / potential fraud | ☐ Inadequate Provider Network | ☐ Quality of care |
| ☐ Benefits change / reduction | ☐ Insurance Cancellation | ☐ Other |
| ☐ Billing Error / Overcharged | ☐ Enrollment / Disenrollment Issues | ☐ Premium increase |

☐ Yearly Estimated Dollars Saved $

**Action Taken to Date:** Add Action Taken

**What action would the client like to see happen?:** Add Client Action Request

# Search Client Contact Records (CCRs)

You can do a CCR search by client name, phone number, counselor name, date of contact or CCR number.

You can search for CCR in the *Client Contact Record Search page*. SHIBA Online opens to this page by default once logged in.

'%' serves as the "wildcard" character to use.

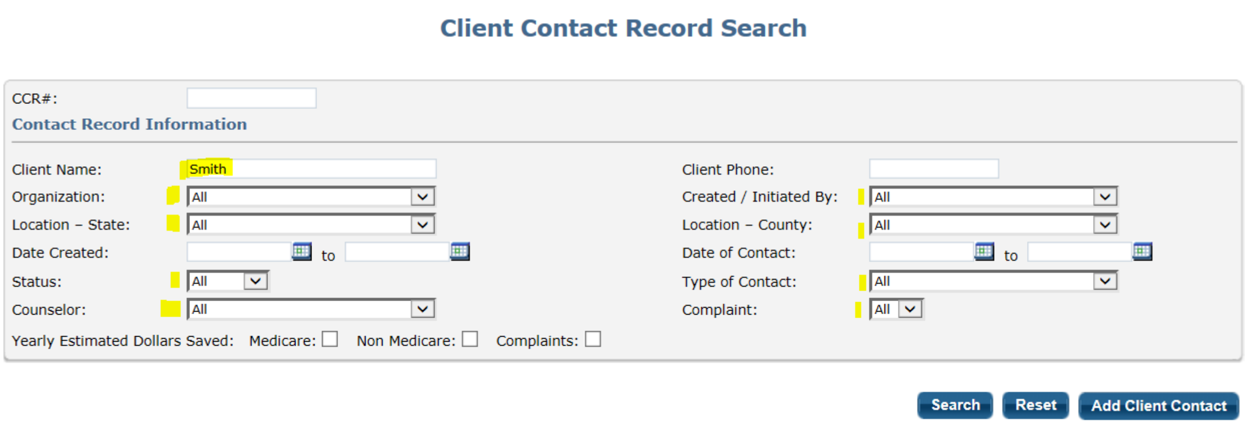
Example:

Client Name: *Matilda S%*

This search would result in CCRs with Matilda as the first name with last names starting with "S."

Enter your available search criteria and select "Search."

Sample search:



Client Contact Record Search

CCR#:

Contact Record Information

| | | | |
|---|---|---|---|
| Client Name: | Smith | Client Phone: | |
| Organization: | All | Created / Initiated By: | All |
| Location – State: | All | Location – County: | All |
| Date Created: | to | Date of Contact: | to |
| Status: | All | Type of Contact: | All |
| Counselor: | All | Complaint: | All |

Yearly Estimated Dollars Saved: Medicare: ☐ Non Medicare: ☐ Complaints: ☐

Search | Reset | Add Client Contact

Sample search result:

Search Results

Export To Excel

1 - 7 of 7 records

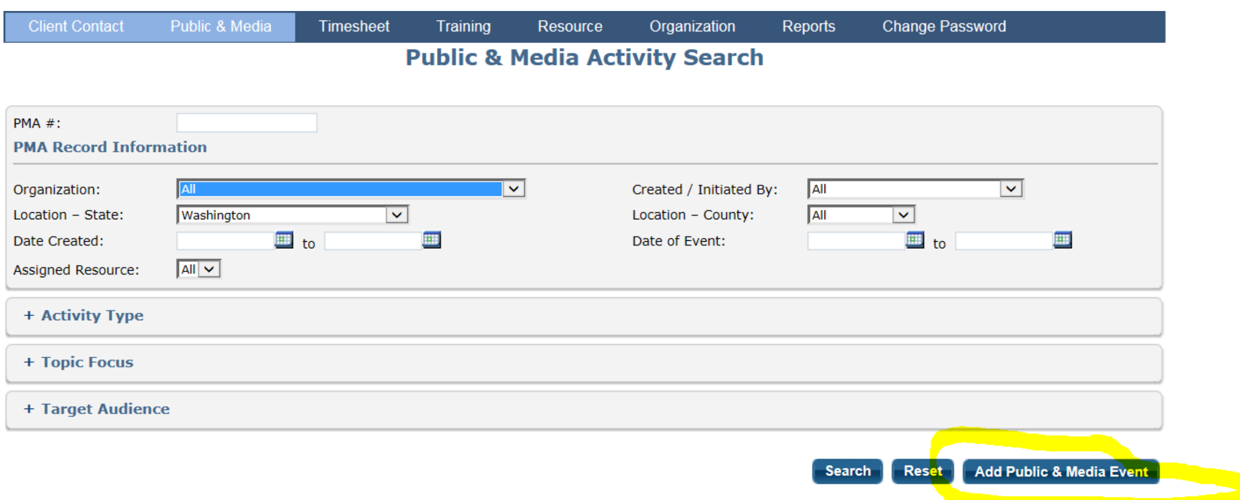
| CCR# | Status | Client Name | Counselor | Date of Contact | Created Date | Most Recent Note |
|---|---|---|---|---|---|---|
| 1232217 | Closed | Smith | Brooks, Sonja N | 10/30/2014 | 11/03/2014 | |
| 1223092 | Closed | Smith | Gorton, Cherie B | 09/22/2014 | 10/01/2014 | |
| 1301578 | Closed | Smith | Austin, Janet L | 08/10/2015 | 09/29/2015 | Client intake, needed assistance with information for health insurance. |
| 1077422 | Closed | Smith | Hurley, Robert W | 09/10/2012 | 10/09/2012 | Calling for son. Goes to a mental health clinic but his MA-PD does not work with that clinic. He said Group Health was refusing to treat his son by... |
| 1234356 | Closed | Smith | Brooks, Sonja N | 11/07/2014 | 11/07/2014 | |
| 1249160 | Closed | Smith | Brooks, Sonja N | 12/30/2014 | 12/30/2014 | |
| 1177415 | Closed | Smith | WOOD, REBECCA L | 01/14/2014 | 01/31/2014 | |

1 - 7 of 7 records

# Entering Public Media Activity (PMA)

### Sponsor performance

The PMAs are part of our sponsor and federal performance measures. You should enter any outreach/media activity as a PMA in SHIBA Online as soon as the activity is complete, but no later than the reporting deadline provided by the SHIBA grants and budget coordinator.

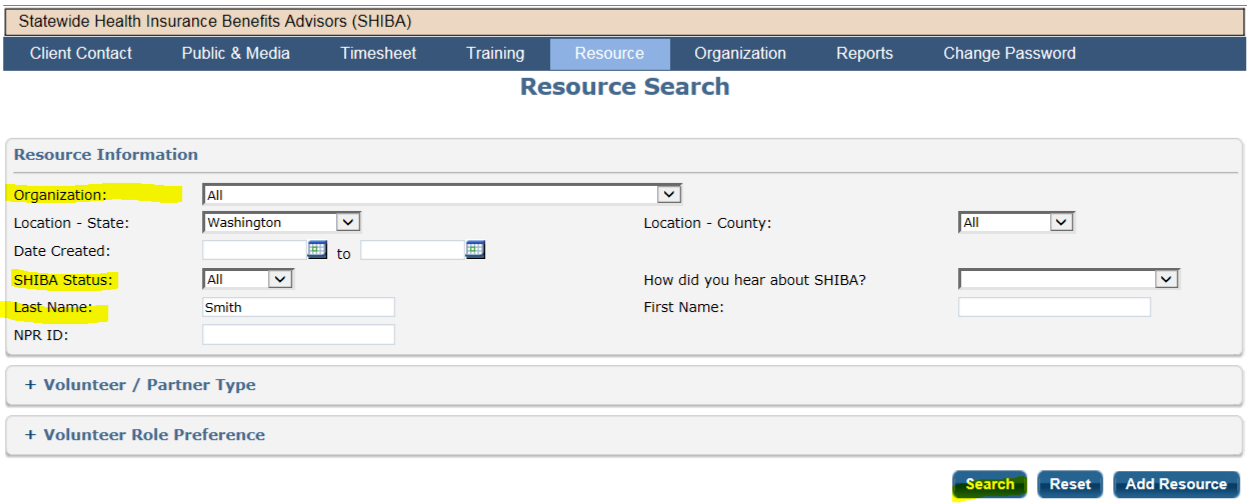



Note: For media event via radio or newspaper the answer to the “Expected” and “Actual” # of participants is best estimate.

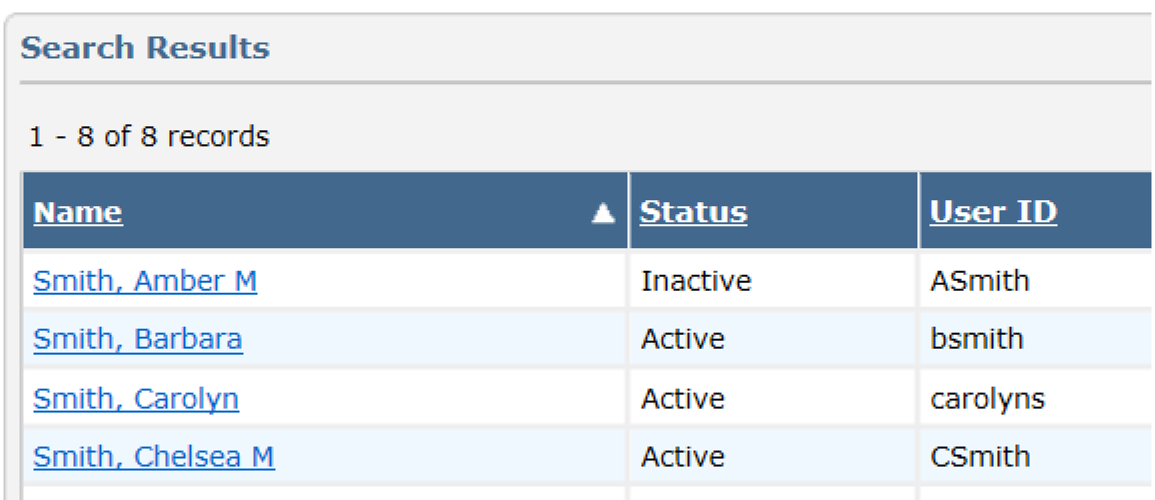
# Resource management

Volunteer coordinators can assign a volunteer's status as "Active" or "On Leave" under the *Resource* tab.

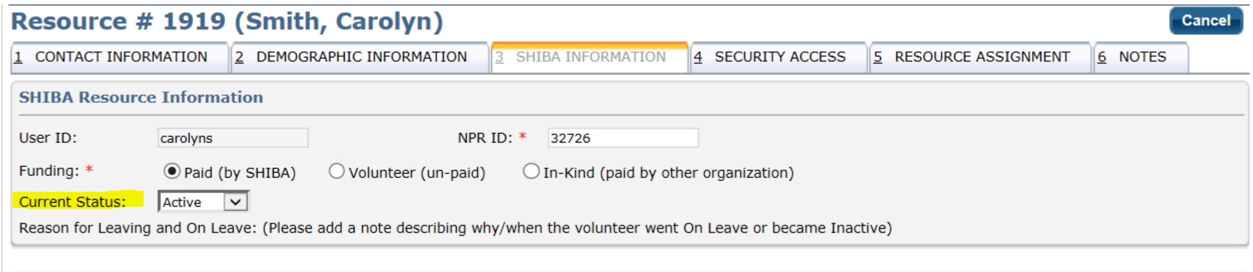
Under the Resource tab, find the volunteer's record by selecting your *Organization* from the drop-down, use the *SHIBA Status* field if you want, and searching by their *Last Name*. Then select *Search* at the bottom right of the screen.




Select the volunteer from the *Search Results* screen.



Update the *Current Status* field as necessary using the drop down menu.

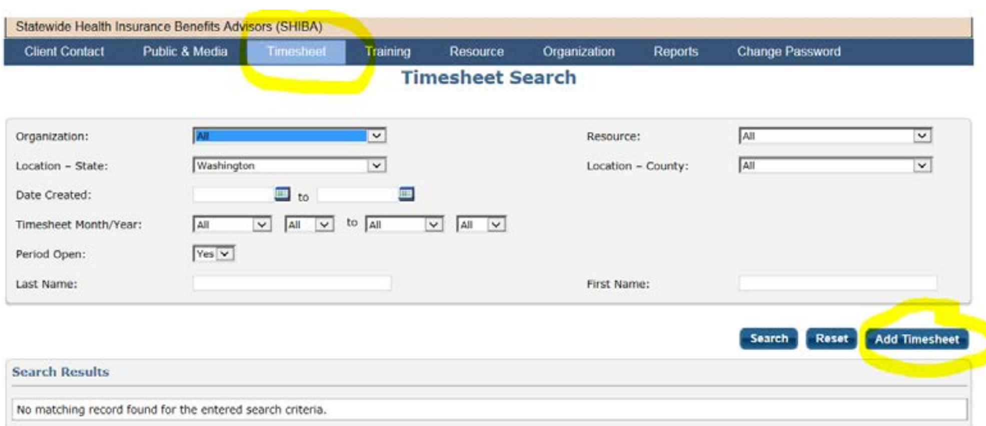



Email address changes and volunteer resignations or terminations must be relayed to shiba@oic.wa.gov.

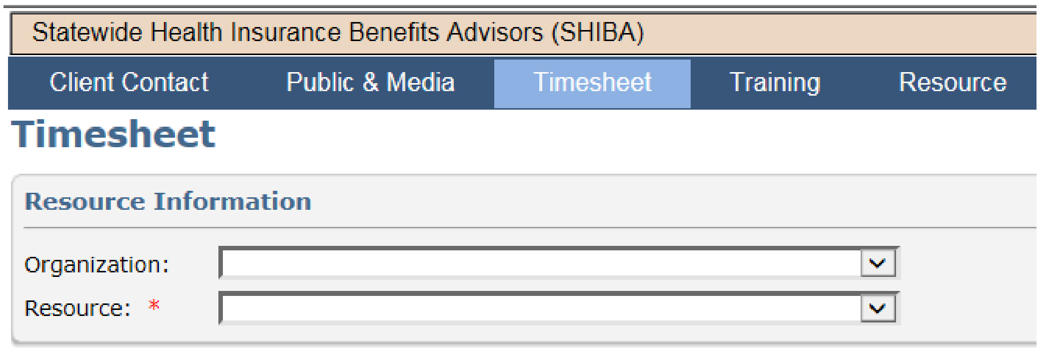
See *Reports* for *Resource Hours Listing* report.

# Volunteer timesheets

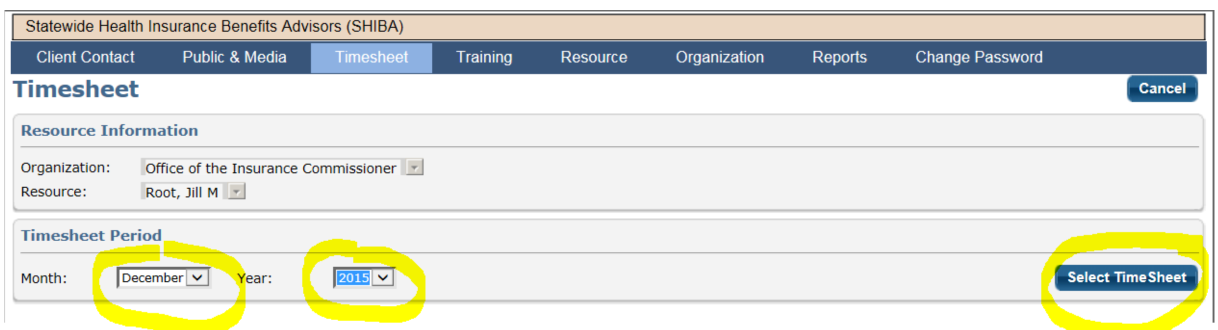
Under the *Timesheet* tab, select *Add Timesheet* at the bottom right-hand corner.




Select your organization from the *Organization* drop-down menu. Then select *Resource*. Some resources (volunteers) work for more than one organization. It's a good practice to select the *Organization* even though it's not a required field to make sure the resource activity shows under your organization.




Select the *Year* from the drop-down. Then select the *Month* from the drop-down. The month and year will only show if it is still available to accept data. The month and year are not available once it has been closed to finalize and submit reports. Email [shiba@oic.wa.gov](mailto:shiba@oic.wa.gov) if you need a month open. Once a month and year have been closed, however, activity will not count toward sponsor performance.




Select *Add Time*.


Enter the *Date*, *Hours,* and *Minutes*. Select the *Activity Type* from the drop down. Include comments, if necessary. Select *Save.*

***Activity Type* definitions:**

Program Management is primarily time spent by volunteer coordinators doing the following:

- interviewing potential volunteers
- report writing
- developing business objectives/plans
- conducting performance reviews with volunteers
- meetings with the regional training consultants or other SHIBA related meetings

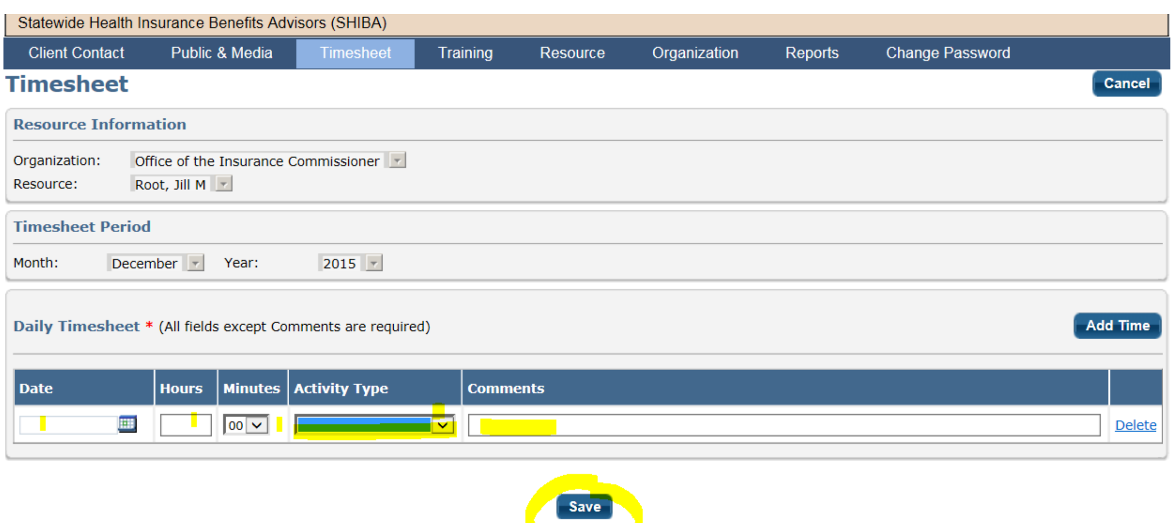
Outside Training examples are: Annual

- CMS National Training Program (NTP) typically held in the summer,
- Webinars or online classes provided by ACL/SMP, NCOA, etc.

Administrative Support is primarily for those folks who do data entry of CCR's, PMA's, or creating volunteer files and sending to OIC.

| Note: Travel and driving time to and from a counseling session should be captured under *Time Spent* on the *Volunteer Information* page of the Client Contact Record. |
|---|

To add another date, select *Add Time* again and repeat entry steps followed by selecting *Save.*



# Reports

Report options are under the *Reports* tab.

## Resource hours listing

NOTE: The computer you use to run the Resource Hours Listing report will need Microsoft Excel installed.


Select the *Timesheet Period*: *From* and *To*

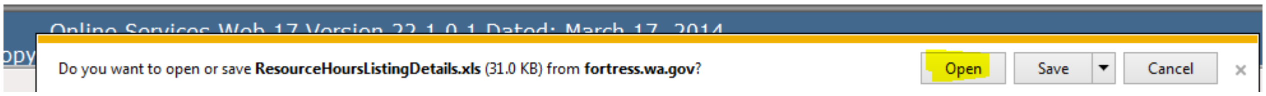
Select the *Organization* from the drop-down menu

Select *Active* for SHIBA Status

Select *Run Report*

SHIBA OFFICE of the INSURANCE COMMISSIONER WASHINGTON STATE

Select *Open*




The report opens in an Excel workbook.

Resources with zero total hours should be verified to see if they need to be inactivated or put *On Leave*.

Send resources you want inactivated to shiba@oic.wa.gov.

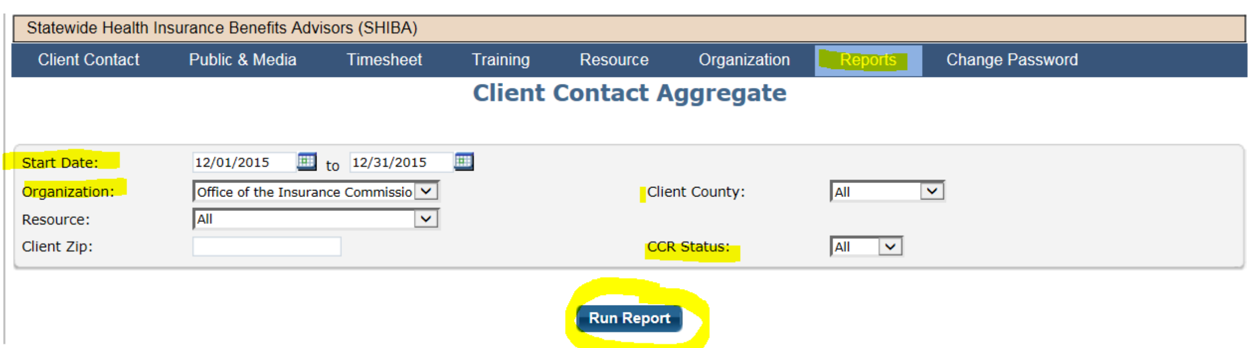
| | | | | |
|---|---|---|---|---|
| Resource Hours Listing | | | | |
| Organization: AGING & LONG TERM CARE OF EASTERN WA | | | | |
| Resource: All SHIBA Status: Active | | | | |
| Timesheet Period: 01/01/2014 to 03/18/2014 | | | | |
| Created by Root, Jill M on 3/18/2014 | | | | |
| Resource | Organization | Total Hours | CCR Hours | PMA Hours |
| Adkins, Katie N | AGING & LONG TERM CARE OF EASTERN WA | 0 | 0 | 0 |
| Armstrong, Evan L | AGING & LONG TERM CARE OF EASTERN WA | 0 | 0 | 0 |
| Baker, Beverly V | AGING & LONG TERM CARE OF EASTERN WA | 0 | 0 | 0 |
| Bordsen, Marwiyah | AGING & LONG TERM CARE OF EASTERN WA | 0 | 0 | 0 |
| Bowles, Linda G | AGING & LONG TERM CARE OF EASTERN WA | 12 | 2 | 4 |
| Brabham, Julie A | AGING & LONG TERM CARE OF EASTERN WA | 0 | 0 | 0 |
| Bradley, Laurie P | AGING & LONG TERM CARE OF EASTERN WA | 4 | 4 | 0 |
| Burkett, Lynn | AGING & LONG TERM CARE OF EASTERN WA | 0 | 0 | 0 |
| CAIN, DONALD R | AGING & LONG TERM CARE OF EASTERN WA | 11 | 4 | 4 |
| Christiansen, Rachel R | AGING & LONG TERM CARE OF EASTERN WA | 0 | 0 | 0 |
| CHURCHILL, VELMA I | AGING & LONG TERM CARE OF EASTERN WA | 6 | 0 | 0 |
| Detlefsen, Andrea M | AARP Washington Fraud Fighter Call Center, | 0 | 0 | 0 |
| DiValentino, Mary Kay | AGING & LONG TERM CARE OF EASTERN WA | 110 | 44 | 0 |

## Client Contact Aggregate report

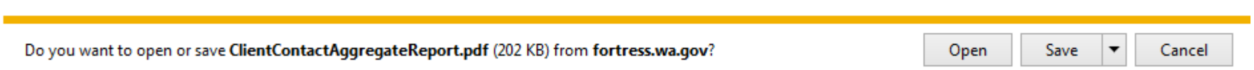
The *Client Contact Aggregate* report is helpful to assess the status of your sponsor performance. The report can help determine if adjustments are needed to meet the targeted performance tier for the month as set forth in your sponsor's contract with SHIBA.


Select the parameters for your Client Contact Aggregate report.

Select *Run Report*




Select *Open*




The Client Contact Aggregate report opens as a .pdf document (8 pages+) and provides aggregate totals for each field in the Client Contact Record.

# Client Contact Aggregate Report

For the Period 12/01/2015 to 12/31/2015

| Client Contact Information | | | |
|---|---|---|---|
| Total Count of CCRs | 10 | | |
| Total Time Spent (Minutes) | 150 | Average Time per Activity (Minutes) | 15.00 |

| Type of Contact | # of Contacts | Total Time (Min) | % of Total # of CCRs |
|---|---|---|---|
| Email/fax/postal mail | 10 | 150 | 100 |
| In Person (home visit Staff only) | 0 | 0 | 0 |
| In Person (site) | 0 | 0 | 0 |
| Quick Call (<10 min) | 0 | 0 | 0 |
| Telephone | 0 | 0 | 0 |
| Total: | 10 | 150 | |

| Client Beneficiary | # of Contacts | % of Total # of CCRs |
|---|---|---|
| Agency / Social Services | 0 | 0 |
| Caregiver / Legal Rep | 0 | 0 |
| Daughter | 0 | 0 |
| Father | 0 | 0 |
| Grandchild | 0 | 0 |
| Grandparent | 0 | 0 |
| Mother | 0 | 0 |
| Other | 1 | 10 |
| Other Family | 0 | 0 |
| Provider | 0 | 0 |
| Self/Client | 9 | 90 |
| Significant Other / Domestic Partner | 0 | 0 |
| Son | 0 | 0 |
| Spouse | 0 | 0 |

| Client Demographics | Age Range | # of Contacts |
|---|---|---|
| | 0-19 | 0 |
| | 20-30 | 0 |
| | 31-40 | 0 |
| | 41-50 | 0 |
| | 51-64 | 2 |
| | 65-74 | 0 |
| | 75-84 | 0 |
| | 85+ | 0 |
| | Declines to Disclose | 8 |

Root, Jill M    2/10/2016 1:36:55 PM    Page 1 of 8

## Public & Media Activity Aggregate report

The *Public & Media Activity Aggregate* report is helpful to assess the status of your sponsor performance. The report can help determine if adjustments are needed to meet the targeted performance tier for the month as set forth in your sponsor's contract with SHIBA.

The zip code parameter can be used to analyze outreach efforts in targeted zip codes, for example LIS/MSP.


Select the parameters for your Public & Media Activity report.

Select *Run Report.*

Select *Open*

Do you want to open or save **PMAAggregateReport.pdf** (185 KB) from **fortress.wa.gov**? Open | Save | Cancel

The Public & Media Activity Aggregate report opens as a .pdf document (3pages+) and provides aggregate totals for each field in the Public & Media Activity record.

**Public & Media Activity Aggregate Report**

For the Period 12/01/2015 to 12/31/2015

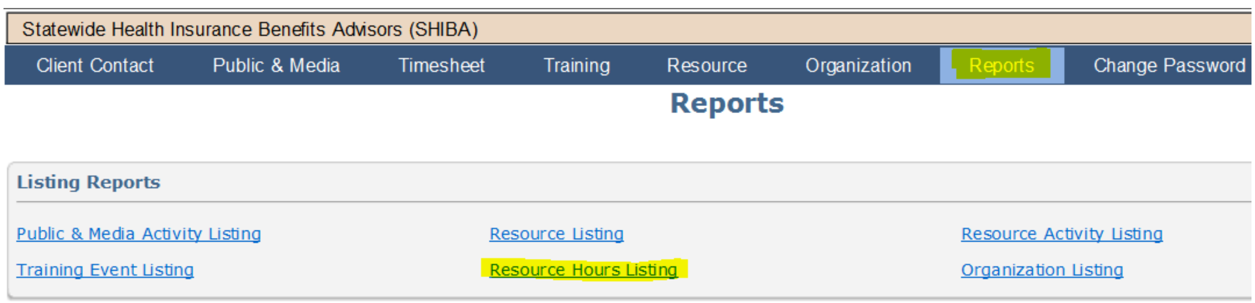
| **Activity Type** | | | | | |
|---|---|---|---|---|---|
| **Community Education** | **# of Activities** | **Total Exp. # of Participants** | **Total Actual # of Participants** | **Total Est. # Enrolled in Medicare Part D** | **Total Length of Activities (Minutes)** |
| A. Public Presentation (speaking engagement) | 0 | 0 | 0 | 0 | 0 |
| B. Public Workshop (group counseling) | 0 | 0 | 0 | 0 | 0 |
| C. Partner Training | 0 | 0 | 0 | 0 | 0 |
| D. Media (newspaper/newsletter - article or interview) | 0 | 0 | 0 | 0 | 0 |
| E. Media (radio - not a PSA or ad) | 0 | 0 | 0 | 0 | 0 |
| F. Media (TV / cable show - not a PSA or ad) | 0 | 0 | 0 | 0 | 0 |
| G. Targeted information mailings | 0 | 0 | 0 | 0 | 0 |
| H. Enrollment event | 0 | 0 | 0 | 0 | 0 |
| I. Drop-in Counseling | 0 | 0 | 0 | 0 | 0 |
| J. Other (please describe) | 0 | 0 | 0 | 0 | 0 |
| **Community Education Totals:** | **0** | **0** | **0** | **0** | **0** |
| **Outreach Activities** | | | | | |
| A. Public Presentation (speaking engagement) | 0 | 0 | 0 | 0 | 0 |
| B. Outreach Meeting (w/ community organization) | 0 | 0 | 0 | 0 | 0 |
| C. Networking Meeting (w/ other partners) | 0 | 0 | 0 | 0 | 0 |
| D. Media (newspaper/newsletter - article or interview) | 0 | 0 | 0 | 0 | 0 |
| E. Media (radio - not a PSA or ad) | 0 | 0 | 0 | 0 | 0 |
| F. Media (TV / cable show - not a PSA or ad) | 0 | 0 | 0 | 0 | 0 |
| G. Media (public service announcement or paid ad) | 0 | 0 | 0 | 0 | 0 |
| H. Booth / Exhibit at Health or Senior Fair / etc. | 0 | 0 | 0 | 0 | 0 |
| I. Targeted informational mailings | 0 | 0 | 0 | 0 | 0 |
| J. Website (web postings, online conference, chatroom, etc.) | 0 | 0 | 0 | 0 | 0 |
| K. Other (please describe) | 0 | 0 | 0 | 0 | 0 |
| **Outreach Activities Totals:** | **0** | **0** | **0** | **0** | **0** |

Root, Jill M 2/10/2016 1:43:34 PM Page 1 of 3

## Resource Listing

The Resource Listing report can be used for VCs to retrieve emails and User IDs for volunteers or in-kind staff. The User ID and email are required to use the 'Forgot Password' link and reset password.

From the *Reports* tab select *Resource Listing*.



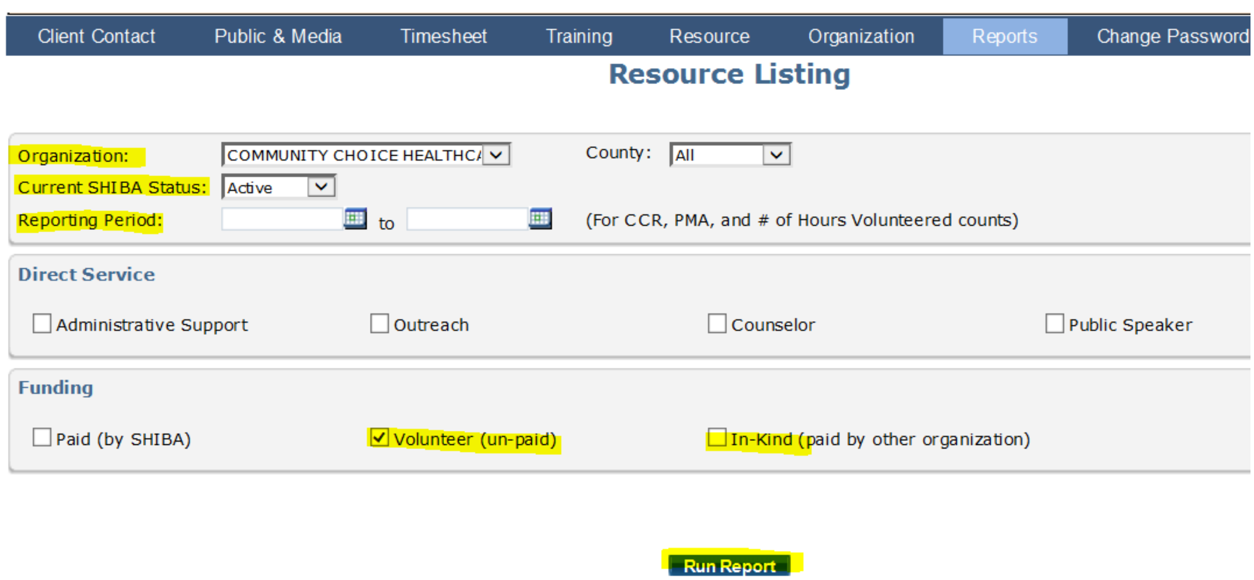

Select your *Organization* from drop down menu.

Select the *Current SHIBA status*.

*Reporting Period* is optional.

Check either or both *Volunteer (un-paid)* and/or *In-Kind (paid by other organization)*.

Select *Run Report*.



# Section 16 – Travel

## What you need to know before you travel

### Travel that requires pre-approval

Pre-approval is required for:

- Overnight travel (even if staying with friends or family)
- Rental cars
- Airfare
- Reoccurring same-day travel, such as dispersing publications in rural areas

Volunteer coordinators are required to seek out pre-approval for same-day travel (not overnight) for volunteers for *reoccurring* travel. Some examples of reoccurring travel are distributing publications to outlying areas, counseling at remote sites, or attending training outside of the assigned sponsor's area. This requirement is to ensure adequate funding is available prior to the volunteer incurring travel expenses.

### When the OIC pays for SHIBA volunteers to travel

To qualify for reimbursement for travel from the Office of the Insurance Commissioner (OIC), your travel must meet all of the following:

- The volunteer application process must be completed.
- Travel that requires pre-approval must be approved prior to incurring travel expenses.
- You must travel at least 50 miles one way for overnight travel approval consideration
- Your travel must be for SHIBA-related business, such as special training, assisting at an outreach event, or volunteer conference.
- You must first pay for the travel and then turn in your Travel Expense Voucher form to the OIC for reimbursement.
- Your travel costs must be less than or equal to the per diem rate.

## How to get pre-approval for travel

Take the following steps at least 10 working days before incurring travel expenses:

1. Complete the Agency Travel Request form.
   a. Estimate subsistence (food) and lodging costs using the current per diem rate for the area you will travel to.
   b. Estimate mileage using a web-based mileage locator (i.e., Mapquest, Bing map, etc.) or global positioning system (GPS).
   c. If you plan to carpool or share a room with another volunteer, include that information and the person's name in the "Explanation for Exception" box.
2. If you have questions, talk to your regional training consultant, volunteer coordinator, or the SHIBA administrative assistant at shiba@oic.wa.gov or 360-725-7097.
3. Keep a copy of your form for your own records.
4. Send the completed Agency Travel Request Form to the attention of the SHIBA program administrative assistant via:

   **FAX:** 360-586-4103 (be sure to email shiba@oic.wa.gov in advance that you are faxing the travel request)

   **Email:** shiba@oic.wa.gov

   **U.S. Mail:**

   Office of the Insurance Commissioner
   SHIBA Administrative Assistant
   PO BOX 40255
   Olympia WA 98504-0255

   We will notify you when we've approved your travel request. After you've completed your travel, you will need to submit your completed Travel Expense Voucher.

**Note:** In very limited cases, the SHIBA program manager will grant pre-approval to large groups of volunteers, and individual Agency Travel Request forms are not needed, such as if SHIBA hosts a statewide volunteer conference. Assume individual pre-approval is required unless otherwise notified by the SHIBA program office.

If you're unsure if you need pre-approval for travel, email shiba@oic.wa.gov.

## Travel costs the OIC will reimburse

If your travel costs meet the OIC's requirements above, then we may reimburse you for:

Transportation

We ask that you use the least costly option. If this is something other than driving, we will need a cost comparison. We ask that volunteers consolidate trips and carpool when possible, especially if volunteers from the same local group travel to the same location.

Note: For carpools, the OIC will reimburse only one SHIBA volunteer for mileage. This is typically the driver, but may be a passenger (if the driver is not a SHIBA volunteer or the car belongs to the passenger).

Fares for bus, train, and ferries are reimbursable. Toll fees are reimbursable. Keep receipts.

Lodging

The cost must not exceed the per diem rate, unless the OIC grants an exception during the travel request approval process.

**Note:** It is the responsibility of the traveler to ensure they are being charged the government lodging rate.

Parking

Use the least costly option. Parking does not include tips, valet service, or extra in and out expenses. Keep receipts when provided.

Meals

The OIC reimburses meals only when an overnight stay is needed and you have received pre-approval. Receipts are not required for meals. Meals are paid at the per diem rate.

## What to do during the trip

To ensure your reimbursement goes smoothly, take these steps during your trip:

- If you're driving, keep track of mileage. Use your odometer, mapping on a website or global positioning system (GPS).
- You may include small detours for personal comfort breaks (i.e., food, restrooms, stretching, etc.), but the OIC will not reimburse for long detours.
- If you have lodging costs, get an original receipt.
- If you pay for parking, ferries, tolls, etc., keep track of your costs.  Submit receipts if you received receipts for these type of expenditures.

## What to do after the trip to get reimbursed

1. Complete the SHIBA Volunteer Travel Expense Voucher form.

2. Complete the Statewide Payee Registration and W-9 forms.  These forms are required with the first submittal for travel reimbursement.  The forms need to be re-submitted if the individual has moved or if there is missing or conflicting information on the forms.

    - Volunteer coordinators and volunteers check the *Volunteer* box in Section 3 of the W9 form.

3. Keep a copy of your forms and receipts for your records.

4. Send your original SHIBA Volunteer Travel Expense Voucher, Statewide Payee Registration and W-9 forms, and your original lodging receipts to:

    Office of the Insurance Commissioner
    SHIBA Administrative Assistant
    PO BOX 40255
    Olympia WA 98504-0255

## When to expect the reimbursement

You should receive your reimbursement in approximately 20 working days after we receive your completed and correct paperwork at the SHIBA program office. Missing or incomplete information or use of outdated forms will delay reimbursement. Email shiba@oic.wa.gov if you do not receive your reimbursement 25 working days after submitting it to the SHIBA program office.

# Section 17 – Volunteer application process

See SHIBA Online section to get login credentials for SHIBA sponsor staff (paid, in-kind).

<table>
<tr><th colspan="2">PATH TO CERTIFICATION: STEP 1 - APPLICATION</th></tr>
<tr><th>A. PROSPECTIVE VOLUNTEERS</th><th>ROLES</th></tr>
<tr><td>1. Prospective applicants can submit an inquiry of interest to volunteer with SHIBA in the following ways:<br><br>• Ask Mike link on the Office of the Insurance Commissioner (OIC) web page<br>• The SHIBA webpage on the OIC public website<br>• Call 1-800-562-6900<br>• At an outreach event<br>• Contact local SHIBA sponsor<br>• Another SHIBA volunteer<br>• Other sources<br><br>a. SHIBA volunteers cannot have an active individual or agency producer license, or have any interest, directly or indirectly, in an insurance company other than as a policyholder.<br><br>b. Minors (under age 18) may volunteer with parental consent.</td><td>PROSPECTIVE VOLUNTEER</td></tr>
<tr><th>B. VOLUNTEER PACKET ISSUANCE AND COMPLETION</th><th>ROLES</th></tr>
<tr><td>1. The SHIBA secretary senior will refer prospective volunteers to the volunteer coordinator for the prospective volunteers’ county of residence.<br><br>2. The SHIBA Tumwater office will send completed Volunteer Application Packets it receives directly from prospective volunteers to the volunteer coordinator prior to processing and prior to completing a background check.<br><br>NOTE: volunteer coordinators will vet all prospective volunteers per the Path to Certification.</td><td>SECRETARY SENIOR<br><br>SHIBA STAFF</td></tr>
<tr><td>3. The volunteer coordinator can provide the Volunteer Application Packet to the prospective volunteer by email or in hard copy.<br><br>The Volunteer Application Packet is located on My SHIBA</td><td>VOLUNTEER COORDINATOR</td></tr>
</table>

| | |
|---|---|
| 4. Volunteer coordinator schedules and conducts onboarding interview with volunteer.<br>• Discuss and determine volunteer's availability for scheduling, etc.<br>• Discuss preferred roles, i.e., counseling, data entry, outreach, etc.<br><br>5. The prospective volunteer and volunteer coordinator complete the Volunteer Application Packet.<br><br>A complete Volunteer Application Packet includes:<br>• SHIBA Volunteer Application<br>• SHIBA Volunteer Agreement<br>• SHIBA Online Resource Record<br>• Washington State Patrol (WSP) Request for Criminal History Information (Background Check)<br>• Unique ID Confidentiality Agreement | **PROSPECTIVE VOLUNTEER**<br><br>**VOLUNTEER COORDINATOR** |
| ***TIPS for prospective volunteers and volunteer coordinators to expedite the processing of Volunteer Application Packets:***<br>• Ensure handwriting is legible.<br>• Ensure all form fields are completed.<br>• Primary email address is unique and correct. Email cannot be the same as another email in the SHIBA network. A group email address cannot be used by more than one resource, for instance.<br>• If criminal history is disclosed on application, include written sponsor consent/support to process Volunteer Application Packet. | **PROSPECTIVE VOLUNTEER**<br><br>**VOLUNTEER COORDINATOR** |
| 6. Volunteer coordinators can scan and send the completed Volunteer Application Packets via email to: shiba@oic.wa.gov or via fax to: (360) 586-4103.<br>• When faxing a packet, the volunteer coordinator should email the secretary senior at: shiba@oic.wa.gov to alert him/her to check the fax machine. | **VOLUNTEER COORDINATOR** |

| C. VOLUNTEER APPLICATION PROCESSING | ROLES |
|---|---|
| 1. Secretary senior receives completed Volunteer Application Packets and logs into **Volunteer Tracking spreadsheet**. | **SECRETARY SENIOR** |

| | |
|---|---|
| a. Volunteer Tracking spreadsheet saved to:<br><br>[W:/Volunteer Management/Volunteer Tracking Workbook.xlsx](W:/Volunteer Management/Volunteer Tracking Workbook.xlsx)<br><br>2. Secretary senior will process *completed* Volunteer Application Packets within three business days in most cases.<br><br>NOTE: Sponsors' paid staff (in-kind) do not require background checks. The sponsors, as employers, are liable for their own paid staff. | |
| 3. Processing the Volunteer Application Packets includes:<br><br>a. **WSP Background Check**, if cleared proceeds with:<br><br>1) Creating a volunteer folder, usually red folder.<br>2) Establishing **SHIP NPR resource record**<br>3) Establishing **SHIBA Online resource record**<br>4) Enters/updates **Volunteer Tracking spreadsheet**<br>5) Emailing volunteer coordinator and regional training consultant via e-mail when volunteer application is processed<br>6) Filing completed application packet into volunteer folder and filing in active volunteer file cabinet<br><br>b. WSP Background Check, if not cleared:<br><br>1) Secretary senior coordinates with SHIBA program manager and volunteer coordinator for consideration of moving forward.<br><br>a) If cleared, proceed as above.<br>b) If not cleared, volunteer coordinator will notify prospective volunteer of decision.<br><br>NOTE: Background check results provided by the sponsor can be accepted if they comply with Child/Adult Abuse Information Act (RCW 43.43.830 through 43.43.845). | **SECRETARY SENIOR** |

| D. VOLUNTEER INITIATES ACCESS/CONFIRMS E-MAIL ADDRESS | ROLES |
|---|---|
| 1. SHIBA Online Access<br><br>a. Volunteer will receive automated email with User ID and temporary password to set up new password in SHIBA Online and establish access. SHIBA Online Report access is necessary to enter CCRs, | **VOLUNTEER** |

| | |
|---|---|
| Public Media Activity (PMA), and reference consumer information from prior contacts.<br><br>NOTE: Use "Forgot Password" link to reset password if lost or forgotten. Report password issues to secretary senior at shiba@oic.wa.gov. | |
| 2. SHIP NPR Email Confirmation<br><br>a. Volunteer will receive automated email from Shiptalk.npr to confirm email address. Volunteer needs to confirm email address. Report new emails or issues to secretary senior at shiba@oic.wa.gov. | **VOLUNTEER** |
| ***TIPS if automated e-mails above are not received:***<br><br>• Volunteer should check junk and/or spam folder(s). | **VOLUNTEER** |

| **PATH TO CERTIFICATION: STEP 2 – INITIAL INTERVIEW** | |
|---|---|
| **A. INITIAL INTERVIEW** | **ROLES** |
| 1. Volunteer coordinator schedules and conducts initial interview with volunteer.<br><br>• Presents volunteer with *Medicare and You* book<br>• Presents volunteer with Volunteer Handbook (when available)<br>• Explains certification process<br>• Discuss and determine volunteer's availability for scheduling, etc.<br>• Preliminary discussion about preferred roles, i.e., counseling, data entry, outreach, etc. | **VOLUNTEER COORDINATOR AND VOLUNTEER** |

| **PATH TO CERTIFICATION: STEP 3 – BASIC TRAINING** | |
|---|---|
| **A. SCHEDULES BASIC TRAINING** | **ROLES** |
| 1. Volunteer coordinator provides new volunteer guidance on how to complete Basic Training either in-person or online.<br><br>NOTE: In-person Basic Training class is two days in most cases. | **VOLUNTEER COORDINATOR** |

| **PATH TO CERTIFICATION: STEP 4 – REQUESTS CERTIFICATION EXAM** | |
|---|---|
| **A. CERTIFICATION EXAM** | **ROLES** |

| | |
|---|---|
| 1. Volunteers are encouraged to take the Online Counselor Certification Tool (OCCT) certification exam within three weeks of completing Basic Training.<br><br>2. Volunteer informs volunteer coordinator when he/she completes Basic Training.<br><br>3. Volunteer coordinator sends request for certification exam and provides volunteers' name to shiba@oic.wa.gov and copies the curriculum developer on the email. | **VOLUNTEER AND VOLUNTEER COORDINATOR** |
| 4. SHIBA support staff verify volunteer's application packet has been processed and background check cleared.<br><br>5. SHIBA support staff advise curriculum developer when volunteers are ready to receive OCCT certification exam. | **ADMINISTRATIVE ASSISTANT *OR* SECRETARY SENIOR** |
| 6. Curriculum developer posts the Basic Training completion date in the Volunteer Tracking spreadsheet.<br><br>7. Curriculum developer issues the OCCT certification exam instructions to the volunteer and tracks in the Volunteer Tracking spreadsheet. | **CURRICULUM DEVELOPER** |

| **PATH TO CERTIFICATION: STEP 5 – TAKES EXAM** | |
|---|---|
| 1. The OCCT system will immediately notify the volunteer if he/she has passed or failed and will explain the next steps. | **OCCT SYSTEM** |
| 2. Curriculum developer notes in Volunteer Tracking spreadsheet if volunteer passed or failed. | **CURRICULUM DEVELOPER** |
| 1a. Certification exam passed: volunteer coordinator will assign a mentor for volunteer. | **VOLUNTEER COORDINATOR** |

| **PATH TO CERTIFICATION: STEP 6 – MENTORING TRAINING (*Availability in 2017 – TBD*)** | |
|---|---|
| 1. New volunteer coordinates with RTC on dates available for the in-person training. | **MENTOR AND VOLUNTEER** |

| **PATH TO CERTIFICATION: STEP 7 – REQUEST VOLUNTEER BADGE** |
|---|

| | |
|---|---|
| 1. Volunteer coordinator or someone takes a picture of volunteer adhering to the badge photo guidelines and submits request for a badge for volunteer. (See Addendum - Volunteer Badge process). | **VOLUNTEER COORDINATOR AND VOLUNTEER** |

| PATH TO CERTIFICATION: STEP 8 – SHADOWING | |
|---|---|
| 1. Volunteer coordinator schedules and meets with Volunteer and assigns a mentor and starts tracking a Mentoring Checklist for volunteer. | **VOLUNTEER COORDINATOR** |

| PATH TO CERTIFICATION: STEP 9 – ROLE ASSIGNMENT DISCUSSION | |
|---|---|
| 1. Volunteer coordinator schedules and meets with volunteer to complete the Mentoring Checklist and discuss potential roles.<br><br>NOTE: Email shiba@oic.wa.gov if roles need to updated in SHIBA Online. | **VOLUNTEER COORDINATOR** |

| PATH TO CERTIFICATION: STEP 10 – INITIATING REQUEST CERTIFICATE | |
|---|---|
| 1. Volunteer coordinator submits completed Mentoring Checklist to curriculum developer. | **VOLUNTEER COORDINATOR** |

| PATH TO CERTIFICATION: STEP 11– CERTIFICATE ISSUED | |
|---|---|
| 1. Curriculum developer posts the status of the Mentoring Checklist in the Volunteer Tracking spreadsheet.<br><br>2. Curriculum developer provides the Mentoring Checklist to the secretary senior to file in Volunteer file.<br><br>3. Curriculum developer prepares a certification, works with administrative assistant to route for signatures, and coordinates delivery to regional training consultant to present to volunteer.<br><br>3a. Curriculum developer works with secretary senior to see if badge is ready to accompany certificate. | **CURRICULUM DEVELOPER** |

| | |
|---|---|
| 4. Regional training consultant presents certification (and badge if available) to new volunteer. | **REGIONAL TRAINING CONSULTANT/ VOLUNTEER** |

| **PATH TO CERTIFICATION: STEP 12 – CERTIFIED VOLUNTEER BEGINS** |
|---|
| |

| **PATH TO CERTIFICATION: STEP 13 – CERTIFIED VOLUNTEER ATTENDS UPDATE TRAININGS** |
|---|
| |

Processes that follow the Volunteer Application Process:

- Volunteer Badges
- Medicare Unique IDs

*Reference:*
SHIP Volunteer Program Management Manual -
Chapter 4 – Recruiting New Volunteer

# Section 18 – Volunteer application packet

A complete Volunteer Application Packet includes:

- SHIBA Volunteer Application
- SHIBA Volunteer Agreement
- SHIBA Online Resource Record
- Washington State Patrol (WSP) Request for Criminal History Information (Background Check)
- Unique ID Confidentiality Agreement

The current version of the volunteer application packet should be used at all times. The current version of the Volunteer Application Packet is on My SHIBA.

Related reference: Volunteer application process

*Reference:*
SHIP Volunteer Program Management Manual -
Chapter 4 – Recruiting New Volunteers

# Section 19 – Volunteer badges

| A. CRITERIA FOR BADGE ISSUANCE | ROLES |
|---|---|
| 1. The volunteer coordinator may request volunteer badges for certified volunteers.<br><br>NOTE: Volunteer coordinators are encouraged to coordinate badge requests with secretary senior to arrive for issuance with volunteer certificate. | **VOLUNTEER COORDINATOR** |
| **B. BADGE PHOTO SPECIFICATIONS** | **ROLES** |
| 1. Digital picture specifications for badge pictures:<br><br>a. Use camera with at least 5 megapixels.<br>b. .jpeg or .jpg format<br>c. At least 300 psi (pixels per sq. inch) resolution<br>d. Take picture against solid background.<br>e. Picture size should be no less than 1" x 1".<br>f. Picture should be only from collarbone up<br>g. If possible, do not submit picture sideways that requires rotating<br>h. Include name and sponsor in picture file name<br><br>Example: D – ALTCEW.*jpg* | **ANYONE** |
| 2. Email badge pictures to shiba@oic.wa.gov.<br><br>a. Provide any special instructions for how name is to appear on badge<br><br>Example: "*wants middle initial, 'Jill M. Root'* "<br><br>NOTE: Badges may be made with just first name. Use of the first letter of the last name is encouraged. For example, Jill R., Andre E., etc. | **VOLUNTEER COORDINATOR** |

| | |
|---|---|
| 3. Secretary senior will receive badge request and save in:<br>a. Approved folder if volunteer already processed (approved background check, etc.)<br>b. Pending folder – pending verification volunteer has been processed.<br>4. Schedule for next monthly badge generation date.<br>5. Secretary senior will acknowledge receipt of badge request(s) and let volunteer coordinator know the next date badges are scheduled for processing. | **SECRETARY SENIOR** |

| C. BADGE ISSUANCE | ROLES |
|---|---|
| Secretary senior will:<br>1. Create badges on schedule date each month.<br>2. Secretary senior will mail completed badges to volunteer coordinators.<br>3. Document badge issuance/mailing date in the **Volunteer Tracking spreadsheet**. | **SECRETARY SENIOR** |
| 4. Volunteer coordinators will issue badges to volunteer(s). | **VOLUNTEER COORDINATOR** |

| D. BADGE RETURN | ROLES |
|---|---|
| 1. Volunteer will return badge to volunteer coordinator upon resignation. | **VOLUNTEER** |
| 2. Volunteer coordinator will return the badge to the secretary senior. | **VOLUNTEER COORDINATOR** |
| 3. Secretary senior will note the badge was returned in the **Volunteer Tracking spreadsheet.** | **SECRETARY SENIOR** |

| | |
|---|---|
| 4. Volunteer coordinator will email shiba@oic.wa.gov when volunteer returns badge to them (VC).<br><br>5. Volunteer coordinator will destroy badge. | **VOLUNTEER COORDINATOR** |
| 6. SHIBA support staff will note the badge was returned to volunteer coordinator in Volunteer Tracking spreadsheet. | **SECRETARY SENIOR** |

# Section 20 – Volunteer coordinator role

## Requirements of a volunteer coordinator (VC)

Each SHIBA volunteer must have a clearly identified supervisor who is responsible for direct management of that volunteer. This supervisor is responsible for day-to-day management and guidance of the work of the volunteer and is available to the volunteer for consultation and assistance when necessary. The VC may act as the supervisor, but may also delegate that duty to another volunteer or staff person. The VC, however, is solely responsible for the effective management and deployment of the volunteer program overall that promotes the SHIBA Mission in a positive manner.

Volunteer coordination is a skilled and complex job which requires general management and human resource management skills. The VC also needs to be a person with strong interpersonal skills, motivational techniques, and the ability to oversee a wide range of activities and roles.

## Volunteer coordinator job description

(Sample)

| | |
|---|---|
| **Reports to:** | Sponsor Program Manager or Executive Director |
| **Position located:** | At sponsor site assigned |
| **Number of Hours Worked:** | Determined by sponsor (should align with sponsor contract with SHIBA) |

**Job summary**

SHIBA is a program of the Washington State Office of the Insurance Commissioner (OIC) that provides information on health insurance to Washington State consumers. This position coordinates service delivery through a multi-site network of trained volunteers who provide one-on-one consultations to consumers in person, by telephone, by email (sponsor email account), and through public presentations. This position coordinates the activities of its local community volunteers as well as being the key person responsible for building community partnerships.

**Primary duties/responsibilities**

Responsible for oversight of SHIBA volunteer program. Duties include:

- Volunteer recruitment (to efficiently meet counseling needs in contracted areas)
- Volunteer screening
- Volunteer orientation
- Volunteer coaching and mentoring (per Path to Certification)
- Volunteer placement
- Volunteer recognition
- Volunteer performance evaluation
- Supporting and growing network of satellite locations for volunteer counseling (partnership development)
- Acting as liaison between OIC/community partners/volunteers
- Tracking and reporting program data into SHIBA Online
- Program evaluation – both qualitative and quantitative
- Developing and implement outreach plan
- Timely report generation and submittal to OIC

**Desired qualities/skills**

- Computer literacy
- Ability to coordinate and facilitate webinars
- Ability to work flexible hours (some evening and weekend work required)
- Ability to multi-task
- Ability to communicate effectively with individuals of diverse backgrounds
- Ability to communicate effective both verbally and in writing
- Professional presence
- Team management experience and/or volunteer management experience
- Outreach and public relations experience
- Delegation skills
- Tact and diplomacy

**Position requirements**

- Identify program priorities and establish work plan
- Keep appropriate volunteer records and track volunteer activities
- Identify resources that increase effective volunteer programs
- Attend all appropriate trainings and meetings

**Desired education**

- Bachelor's degree with two years professional experience
- Previous volunteer management experience (can substitute year for year of education)
- Knowledge of health insurance and healthcare marketplace helpful but not required

**Salary**

Commensurate with experience

## Lines of communication

Volunteers are entitled to all necessary information pertinent to the performance of their work assignments. Accordingly, volunteers should be included in and have access to all appropriate memos, materials, and meetings relevant to the work assignments. To facilitate the receipt of this information on a timely basis, volunteers should be included on all distribution schedules and should be assigned a site or mailbox for receipt of information distributed in their absence. Primary responsibility for ensuring that volunteers receive such information rests with the VC.

Lines of communication should operate in both directions and should exist both formally and informally. When possible, VCs should consult with volunteers regarding decisions that would substantially affect the performance of their duties.

## Basic and Update trainings attendance

Volunteer training varies depending on the assigned role. Training is both formal and informal and needs to be relevant and is designed to further enhance the skills of the volunteer. Training is also designed to align field activities with program reporting needs. It provides opportunity for growth; increases volunteer capacity, and develop competence for the roles to be undertaken by the volunteers. Formal training is provided by the SHIBA regional training consultant, who is an OIC staff person. Veteran volunteers may be invited to assist the trainer in presenting materials or coaching the training participants. Training is presented using officially-sanctioned SHIBA training curriculum.

Volunteers and sponsors are encouraged to provide feedback about the effectiveness of training materials and training presentations either verbally to the trainers or to the SHIBA field supervisor, who supervises all SHIBA regional trainers, or via the evaluation forms. Training evaluation forms are available after every training presentation.

The VC is an active partner with their regional training consultant at all Update and Basic Trainings and as such, his or her present is required at all such events. VCs are also responsible for obtaining and setting up the training room and make sure appropriate meals or snacks are available for volunteers.

## Community outreach

The VC is responsible for ensuring a community outreach plan is implemented successfully. The plan should include the activities that the local volunteer team will undertake to raise awareness that the SHIBA program exists both as a community resource for health insurance and health care access questions but also as a rewarding place to volunteer.

Although the VC is ultimately responsible for ensuring outreach happens, volunteers can take the lead in developing the plan and implementing many of the outreach activities. A complete plan will include the following information:

- Sites and dates for community presentations
- What involvement is needed from the SHIBA regional training consultant or other staff
- Strategy to target diverse and hard-to-reach populations
- Methods for promoting events and activities, including media contacts, to ensure successful attendance volumes
- List of sites where SHIBA literature will be distributed and a schedule for replenishing stock
- A timeline for all activities with tasks assigned to specific volunteers and staff
- Other events, such as health fairs, etc. where SHIBA will participate.

See Outreach Event Planning.

## Partnership development

The VC also works with the SHIBA regional training consultant to develop a local partnership development plan. The plan describes which partnerships they will develop, for what purpose, and who will take the lead on contacting the organization and negotiating the agreement. SHIBA has developed a template Memorandum of Understanding (MOU) that is used to document the purpose, specific roles, and contact information for partnerships. Two original signed copies of the MOU are signed by all parties and sent to the SHIBA program manager. Once all originals have been signed, one will be sent to each signing partner and a copy to the local SHIBA regional training consultant.

## SHIBA network meetings and conference

VCs teleconference calls are held bi-monthly. During the calls, program updates, new program initiatives and grants, policies and procedures, questions, and feedback are discussed. Key issues are addressed, therefore, it's critical that either the VC, sponsor staff, or their designee participate in each call.

SHIBA also hosts an annual statewide conference for staff, sponsors, and appropriate volunteers. The annual statewide conference is contingent on funding availability. The conference is an opportunity to network, learn about other programs, and receive professional training. It's also a required meeting for VCs. Generally speaking, the OIC/SHIBA pays the costs of travel, meals, and accommodations for all participants via reimbursement.

Finally, regional sponsor groups also meet on a regular basis to coordinate basic training schedules, share best practices, and give input. The SHIBA regional training consultant can provide information about meeting dates, times and sites.

## Meeting representation

Unless otherwise indicated, sponsors must provide representation by a decision maker at meetings where OIC executive management is present, such as the SHIBA program manager and/or deputy insurance commissioner. The VC is often included in these meetings.

*Reference:*
SHIP Volunteer Program Management Manual -
Chapter 2 – Building Effective Volunteer Involvement

# Section 21 - Volunteer recognition

Recognition must be an integral part of the management process so that volunteers feel valued. An annual SHIBA volunteer recognition event should highlight and reward the contribution of volunteers to the program. Volunteers should be consulted and involved to develop an appropriate format for the event.

In addition, an effective, targeted recognition program can support an organization in many ways. A well-managed recognition program will motivate volunteers by satisfying their individual needs and supporting program goals. A recognition program may contribute to:

- **Productivity**
  Volunteers who are given meaningful tasks will feel rewarded by their own accomplishments.
- **Retention**
  By identifying and addressing the specific needs of individuals and providing recognition that satisfied these needs, volunteers are more likely to stay with your organization.
- **Morale**
  As concern is demonstrated for your volunteers through appropriate task assignment and performance recognition, volunteers' personal satisfaction and willingness to participate will increase.

Recognition programs that typically work are those which:

- Base rewards on an appreciation of the individual volunteer as a unique person with individual needs;
- Are based on individual jobs or tasks;
- Have consistent reward policies, resulting in a sense of trust that effort will receive the proper reward;
- Recognize longevity and special contributions frequently; and
- Offer rewards that can be shared by teams of volunteers.

**Volunteer certification**

The issuance of the volunteer certificates to new (or existing experienced) volunteers can be a recognition activity coordinated by the volunteer coordinator and the regional training consultant. For instance, certificates and badges (if available) can be issued during the monthly Update training meeting. New volunteers completing the Basic Training and have completed the Path to Certification will receive a certificate and can be issued a volunteer badge.

**Volunteer awards and incentives**

Depending on budget availability, the SHIBA program office will coordinate formal volunteer recognition activities during regularly scheduled training meeting or dedicated recognition meetings. SHIBA will purchase service pins and other incentives with pre-approval by the SHIBA program manager, Consumer Protection deputy insurance commissioner, and OIC chief deputy insurance commissioner.

There are no limitations on volunteer recognition incentives provided by SHIBA sponsors. Each SHIBA sponsor may determine their own methods to recognition their SHIBA volunteers. The *SHIP Volunteer Program Management Manual* provides numerous methods to regularly recognize volunteers that are free and provide thoughtful follow up with volunteers to let them know they are providing an important service in their community.

*Reference:*
SHIP Volunteer Program Management Manual -
Chapter 8 – Retaining and Recognizing Volunteers

# Section 22 - Volunteer status

There are three levels of status for a volunteer in SHIBA Online:

- Active
- Inactive
- On Leave

Only SHIBA program staff can activate and inactivate volunteers in SHIBA Online.

Volunteer coordinators can change the status of a volunteer to "On Leave" in SHIBA Online when a volunteer has indicated they are taking a *temporary* hiatus from volunteering. The minimum duration for a hiatus that should result in changing a volunteer status to "On Leave" in SHIBA Online is six (6) weeks. Volunteers that return to service within six weeks can remain active in SHIBA Online.

Reference: Section 15 – SHIBA Online, Resource Management

## Volunteer resignation/termination

*Email the SHIBA program office*:

The volunteer coordinator emails shiba@oic.wa.gov to alert SHIBA secretary senior in a timely manner when a volunteer or volunteers have resigned or been terminated. SHIBA program staff are the only ones that can activate/inactivate a volunteer.

*Send volunteer file to SHIBA program office*:

When a volunteer resigns or is terminated from SHIBA, the volunteer coordinator sends the hard-copy volunteer file to the SHIBA secretary senior. The secretary senior integrates this information to the central volunteer file.

If at any time in the future a volunteer returns to service, or transfers to another volunteer team, the volunteer coordinator may request a copy of the existing volunteer file from the secretary senior.

*Reference:*
SHIP Volunteer Program Management Manual -
Chapter 5 – Matching Prospective Volunteers to Roles

# Section 23 – Volunteer Training and Development

We provide extensive training to all volunteers. We ask volunteers to:

- Strive to become and remain proficient in the performance of their SHIBA role.
- Examine and keep current with emerging knowledge relevant to SHIBA.
- Participate in continuing education relevant to your volunteer role.
- Provide services only within the boundaries of his or her training, SHIBA scope and experience.
- Have a knowledge base of clients' cultures and be sensitive to clients' cultural beliefs.
- Ask the advice and counsel of colleagues and regional training consultants whenever it's in the best interest of clients.
- Refer clients to others when specialized knowledge or expertise is needed to serve clients fully or when additional service is required.
- Attend Update and other training sessions as requested.

There are four components of SHIBA volunteer training:

1. Basic Training
2. Certification Exam
3. Mentoring Checklist
4. Monthly Trainings

Note: For details on SHIBA's available training modules, go to the My SHIBA webpage and find the section on "Volunteer training" to get details about Basic Training and Monthly Volunteer Training.

## Basic Training

New volunteers may start the Basic Training course as soon as they've completed the required paperwork. They can start at their own pace if using the online training slides. This training course is available on My SHIBA and the information is updated as needed to reflect new information and changes. Please see Path to Certification in the manual or on My SHIBA for reference.

Basic Training classes consist of the following topics:

- Welcome to SHIBA
- Health Insurance 101
- Medicare Part A
- Medicare Part B
- Medicare Part D
- Medicare Supplemental (Medigaps)
- Medicare Part C

## Certification exam

All new volunteers, who join SHIBA after January 2014, are required to take and pass a certification exam before they can work with consumers.

## Volunteer mentoring training

After completing the Basic Training, a mentoring training will take place to provide skills and techniques to volunteers for becoming a counselor.

Please reference My SHIBA for additional training materials or references, such as:

- Medicare.gov and Medicare Plan Finder
- SHIBA Online
- Department of Printing (PRT)
- SHIP TA Center
- CMS National Training Program
- Senior Medicare Patrol

## Monthly training

Once a volunteer completes Basic Training, he or she is expected to attend monthly training classes at their sponsor's site. These training sessions consist of three hours of monthly classroom instruction and discussion. Volunteer coordinators also have time on the agenda to share local information.

- Attendance at eight of the 10 monthly training classes is required for certificated volunteers to remain active.
- No monthly volunteer training is scheduled in August or December to accommodate volunteers' vacation schedules.

- Training materials are posted on the password-protected My SHIBA website.
- If you're unable to attend a training, please review the training materials and consult with your volunteer coordinator or your regional training consultant to clarify any questions and to make sure you are given credit for the class.

The trainings will be broken down in to three components called "monthly training packets." The packets will include:

- **Core training** – focus on any changes and new information related to Medicare
- **Monthly training** – broaden the sponsors' and volunteers' focus in their primary areas of business as a SHIBA sponsor.
- **National training** – incorporate national information in our packets when necessary. Any Washington State specific information will be priority.

*Reference:*
SHIP Volunteer Program Management Manual, Chapter 6 – Training Volunteers for Success