Volunteer continuing education
Statewide Health Insurance Benefits Advisors (SHIBA)

The SHIBA volunteer handbook and VRPM policies

- Volunteer Risk Program Management (VRPM)
- Highlights of updates to the volunteer handbook (VH)
- Review of VRPM policies and impact on the VH

July 2018
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**Handouts for July training:**
- Volunteer handbook
- Handbook discussion and verification sign-in sheet

**Items on My SHIBA for July training:**
- July Packet
- VRPM policy manual for partners
- Volunteer handbook
- Handbook discussion and verification sign-in sheet
Volunteer learning objectives

All volunteers, sponsors and volunteer coordinators will need Volunteer handbook and VRPM training by the end of 2018.

After completing the July 2018 monthly training, volunteer advisors and volunteer coordinators will be able to:

- Demonstrate an understanding of the VH by sharing five non-negotiables (policies required in order for you to be an active volunteer) and policy updates.
- Share where you can locate VRPM policies.
- Describe three policies that impact advising a client.
- Describe three primary topics covered in the volunteer handbook.
- List the steps in the path to certification.
- Sign for receipt of the new volunteer handbook (VH).
## Acronyms for this training

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<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tr>
<td>ACL</td>
<td>Administration for Community Living (ACL) <a href="http://www.acl.gov/">www.acl.gov/</a></td>
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<tr>
<td>CMS</td>
<td>Centers for Medicare and Medicaid Services (CMS)</td>
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<td>FAQ</td>
<td>Frequently asked questions (FAQ)</td>
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<td>OIC</td>
<td>Office of the Insurance Commissioner (OIC)</td>
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<td>RTC</td>
<td>Regional Training Consultant (RTC)</td>
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<td>SHIP</td>
<td>State Health Insurance Assistance Programs (SHIP)</td>
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<td>SMP</td>
<td>Senior Medicare Patrol (SMP)</td>
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<td>STARS</td>
<td>SHIP Tracking and Reporting System (STARS)</td>
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<td>VC</td>
<td>Volunteer Coordinator (VC)</td>
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<td>VH</td>
<td>Volunteer Handbook (VH)</td>
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<td>VRPM</td>
<td>Volunteer Risk Program Management (VRPM)</td>
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**Troubleshooting and sharing time**

Please take some time to share with your group the June training about transitioning to STARS:

- Review June learning objectives:
  - Demonstrate an understanding of the primary changes from SHIBA Online to STARS.
  - Cite informational resources for STARS questions specific to entering data and requesting login assistance.
  - Enter a Beneficiary Contact (client interaction) in STARS.

- Discuss content your group was unable to cover during June training
- Questions that remain unanswered

**Notes:**

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VRPM: Business need or opportunity

SHIBA’s grant funder, the Administration for Community Living (ACL) requires all State Health Insurance Assistance Program (SHIP) and Senior Medicare Patrol (SMP) grantees (which includes SHIBA) to adopt a set of volunteer risk and program management standards (VRPM).

The purpose of the VRPM is to enhance the quality, effectiveness and safety of SHIBA services by offering guidance and direction to staff and volunteers. Policies addressing SHIBA volunteers and volunteer management exist in the volunteer handbook and the sponsor operations manual (currently being revised to include VRPM policies).

Target audience
- SHIBA volunteers (prospective, new and existing)
- SHIBA sponsors, directors and volunteer coordinators (VCs)
- SHIBA staff

Stakeholders
- Administration for Community Living (ACL)
- SHIP Technical Assistance (SHIP TA) Center
- Senior Medicare Patrol (SMP) Resource Center
- Office of Insurance Commissioner (OIC)
VRPM: Key messages, goals and tools

Key messages
• VRPM policies are designed to provide a protective system for SHIBA volunteers:
  o Ensure a safe and rewarding work environment
  o Set volunteer expectations
  o Establish mission-essential protections
• These new policies outline the responsibilities of SHIBA sponsors, VCs and agency staff who supervise and support volunteers.
• The VRPM ensures that all SHIBA staff, volunteers and partner organizations play by the same set of rules, which are designed to protect each of us and our clients.
• Deliverables will include:
  o A current volunteer handbook for all volunteers
  o A SHIBA VRPM policy manual
  o VRPM policy updates to the SHIBA volunteer handbook
  o VRPM policy updates to the sponsor operations manual

Notes:
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VRPM overview

The volunteer handbook has been updated to include VRPM policies. Many of these policies are already in place, some have been updated, some are new and some are not currently SHIBA policies (though this could change).

Some policies are currently being reviewed for procedures and development of best practices. Volunteers will be informed of these policies and any changes during monthly continuing education training.

Non-negotiables:

- Confidentiality
- No home visits
- Respectful interaction
- Impartiality
- Background checks
- Reporting loss of confidential information
- Path to certification

Policy update examples:

- SHIBA-specific email address
- Evaluations
- Performance expectations
- Insurance

Examples of policies that impact advising a client:

- Impartial
- Respect
- Safety procedures
- Home visits are not allowed
• STARS
• Roles
• Volunteer training

These are the four primary topics covered in the VRPM with a few examples of each. Refer to the back of the volunteer handbook for a complete list of the VRPM policies.

• Introductory policies and examples
  o Engagement of volunteers
  o Scope
  o Compliances
  o Roles

• Risk management and health and safety
  o Insurance
  o Reporting of abuse
  o Home visits
  o Emergency contact procedures

• Volunteer program management
  o Volunteer rights and responsibilities
  o Standards of performance
  o Length of services
  o Criminal records check
  o Orientation
  o Lines of communication
  o Volunteer conduct
  o Cultural sensitivity
  o Recognition

• Information technology
  o Internet protocol
  o Reporting stolen or lost consumer information
  o Use of social media by volunteers
Notes:
Discussion exercise and signature

VRPM and new VH training is *required for all volunteers* before the end of 2018. We will collect your signature acknowledging this required training and that you have received a paper copy of the new volunteer handbook.

Your RTC will lead a discussion on the VRPM and VH. The questions are on your handout. Fill it out as a part of the discussion.

This is a time to ask questions about the VRPM and VH.

**Discussion**

1. Discuss the exercise questions as a group.
2. Use the list of policies at the back of your volunteer handbook to help with some of the discussion.
3. Fill in your answers on the handout.
4. Print and sign your name.
5. Write in today’s date and your group location.
6. If you have questions that are not fully answered, write them on the back page of this packet and return the sheet to your RTC.
7. Return the signed discussion exercise sheet to your RTC.
If you miss July 2018 training

If you are unable to attend the July 2018 training, the materials will be available on My SHIBA.

**We require all volunteers to receive VRPM and VH training. You must acknowledge receipt of the new volunteer handbook as well as know where to locate the handbook and VRPM materials online.**

This training will be available on My SHIBA.

You must also fill out the form acknowledging receipt of your volunteer handbook. Be sure to return this form to your RTC or volunteer coordinator. All forms must be returned to Diana or Liz in the Tumwater office before the end of November 2018.

If you have any questions, be sure to ask your RTC or VC!
VRPM and VH resources

My SHIBA
- Volunteer Handbook
- VRPM Partner Policy Manual

SHIP TA Center
- Main page
  www.shiptacenter.org/
- SHIP TA Center login page
  www.shiptacenter.org/feature
- VRPM Policies
  www.shiptacenter.org/resource-published/r2/vrpm-policies/
- VRPM Policies List, by name and recommendation
  www.shiptacenter.org/resource-published/r2/vrpm-policies-list/
- Policy Implementation Kit
  www.shiptacenter.org/resource-published/r2/vrpm-policy-implementation-kit/

SMP
- Main page
  https://www.smpresource.org/
- SMP Resource Library login page
  www.smpresource.org/login.aspx
- VRPM Webinar: VRPM Orientation
- VRPM Webinar: Volunteer Involvement Cycle

ACL
- Main page
  [www.acl.gov](www.acl.gov)
- Entellitrak login for STARS
  [acl.entellitrak.com/etk-hhs-acl-prod/login.request.do](acl.entellitrak.com/etk-hhs-acl-prod/login.request.do)
- SMP Programs policies and procedures: VRPM (click this link at the bottom of the page)
Review

We’ve covered:

• VRPM business needs and opportunities
• VRPM description
• VRPM overview of policies
• VH: Discussion and review of materials
• Signed acknowledgement of the VH
• Resources for VRPM and VH
Reminders and future training

Evaluation
Please fill out the training evaluation. We value your feedback!

Future months will be a variety of in-person and distance education-based training. We’ll be coordinating with the RTCs, VCs and sponsors to help ensure successful long-distance training.

Future training
No monthly training is planned for August or December. Volunteers are encouraged to review STARS and VRPM training from June and July 2018.

September - November training: Potential training topics include prescription drug coverage, LINET, open enrollment check-in and Medigaps.
Continuing education evaluation

Date of Training: _____________  Training Location: _________________

How can SHIBA improve the monthly trainings?
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________________________________________________________________________________
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What additional trainings within our SHIBA scope would you like to see?
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What SHIBA training materials (including QRCs) would you like to see added to My SHIBA?
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Other:_________________________________________________________________________
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________________________________________________________________________________

Optional: If you would like to be contacted, please provide your name and contact information. Someone in our office will contact you. Thank you!
Name: ________________________________
Day Phone: _____________________________Email: ________________________________

If you prefer to give electronic feedback about curriculum or training, please contact: Diana Schlesselman: dianas@oic.wa.gov or Liz Mercer: lizm@oic.wa.gov.
Questions:

STARS

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VRPM

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Volunteer handbook

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Return this page to your RTC