

Path to SHIBA certification checklist

For SHIBA *volunteer coordinators (VC)* working with SHIBA volunteers in the role of Medicare counselor.

Becoming a certified SHIBA volunteer involves a multi-step process that the volunteer must complete before they can start to work with clients. To ensure the volunteer’s success, every step of the certification process provides unlimited support and assistance from SHIBA staff and other volunteers. The table below outlines the steps a new volunteer must successfully complete to become a certified SHIBA volunteer Medicare counselor. The path may need to be adjusted for volunteers in other roles, and the volunteer coordinator should discuss the process with the new volunteer.

Note: *This document is for volunteer coordinators* to track the certification process of a volunteer in the role of Medicare counselor. See the companion document *Path to SHIBA Certification Volunteer Tracking Sheet*, which is designed for volunteers and provides more detail with spaces to track dates for each step.

The volunteer must complete all steps as required. Here is a VC quick checklist:

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| <input type="checkbox"/> Step 1: Application | <input type="checkbox"/> Step 5: Certification exam |
| <input type="checkbox"/> Step 2: Interview | <input type="checkbox"/> Step 6: Mentoring |
| <input type="checkbox"/> Step 3: SHIP TA Foundational training | <input type="checkbox"/> Step 7: Acceptance, certificate, badge |
| <input type="checkbox"/> Step 4: Basic training/assessment | <input type="checkbox"/> Next steps |

NV – New volunteer

RTC – SHIBA regional training consultant

VC – SHIBA volunteer coordinator

AA – SHIBA administrative assistant

Steps	Actions	Timing
1. Application	<ul style="list-style-type: none"> Completed NV application and submitted to the VC. Application forwarded to AA for processing and background check completed. 	Application and background check will be processed within 1 week of receipt.
2. Interview	<ul style="list-style-type: none"> VC schedules interview with NV. VC gives NV a Volunteer Handbook and obtains NV signature receipt. During interview, VC reviews the Mentoring Checklist* with the NV and discusses potential roles. 	Scheduled by VC.

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Steps	Actions	Timing
3. Foundational online SHIP TA training	<ul style="list-style-type: none"> • Contacts AA to request login access for NV. • VC tells NV training is on shiptacenter.org. • Reviews results after NV completes chapters 1-3. 	Recommend 2 weeks to complete.
4. Basic training	<ul style="list-style-type: none"> • VC schedules the NV to complete Basic Training either in-person or online** as approved. 	Varies. In-person is 1-2 days.
5. Certification exam	<ul style="list-style-type: none"> • After the NV completes Basic Training, the VC contacts the AA to request exam access for the NV. • The AA emails the link and instructions for the exam to the NV and copies the VC and RTC. • The AA sends a congratulatory email with the exam results to the NV and copies the VC and RTC. <p>Note: If the NV does not pass the exam after two attempts, the AA sends an email to the VC and RTC to suggest further study before attempting to test the third and final time.</p>	Varies.
6. Mentoring	<ul style="list-style-type: none"> • The VC meets with the NV and assigns a mentor for site specific training. 	Varies.
7. Acceptance, certificate and badge	<ul style="list-style-type: none"> • If not already provided, the VC provides the AA with a photo of the NV. • The AA prepares the volunteer certificate and badge and mails them to the VC to present to the NV. <p>Note: A volunteer performing administrative duties only receives a badge with the title <i>Administrative Volunteer</i>.</p>	After completion of mentoring.
<p>Next steps for a certified volunteer:</p> <ul style="list-style-type: none"> • Start working with clients. • Attend a required minimum of eight out of nine monthly continuing education trainings. • Work with VC on Senior Medicare Patrol (SMP) training and the SMP portion of the Path to SHIBA certification. This is optional training. 		

*If the NV will perform administrative duties only and **not** provide counseling or answer questions, the NV is not required to be certified but may choose to do so.

Online (via video meeting) **only by prior permission from both VC and RTC. There must be extenuating circumstances for approval.