

Path to SHIBA certification tracking sheet

For SHIBA *volunteers* in the role of Medicare counselor.

Becoming a certified SHIBA volunteer involves a multi-step process you must complete before you may start to work with clients. To ensure your success, every step of the certification process provides unlimited support and assistance from SHIBA staff and other volunteers.

This tracking sheet is for volunteer use. Use this checklist to track your progress. Note this checklist is geared toward the role of Medicare counselor, however it may be used and adjusted as needed for other roles. Work with your volunteer coordinator for guidance.

NV – New volunteer

RTC – SHIBA regional training consultant

VC – SHIBA volunteer coordinator

AA – SHIBA administrative assistant

Steps	Actions and dates achieved	Timing
1. Application	<ul style="list-style-type: none"> Completed application submitted to the VC for signature. ___/___/___ Receive email invitation to complete the background check. ___/___/___ Receive email from VC that the application and background check have been processed. ___/___/___ Receive log in credentials for STARS. ___/___/___ 	Application and background check will be processed within 1 week of receipt.
2. Interview	<ul style="list-style-type: none"> Meet with the VC and receive Volunteer Handbook. ___/___/___ Review the Mentoring Checklist* and discuss potential roles. ___/___/___ 	VC schedules.
3. Foundational online SHIP TA training	<ul style="list-style-type: none"> Receive login access to Training Center. ___/___/___ Complete Online SHIP Counselor Training Levels 1 & 2 (Note: You're welcome to complete the other levels at any time.) ___/___/___ <p>The VC reviews the results and then schedules Basic Training.</p>	Recommend 2 weeks to complete.
4. Basic training	<ul style="list-style-type: none"> Complete face-to-face basic training either classroom or online** as approved. ___/___/___ 	Varies. In-person is 1-2 days.

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<p>5. Certification exam</p>	<ul style="list-style-type: none"> • Receive email with link and instructions for the exam. (Note: AA copies the VC and RTC.) __/__/__ • Receive congratulatory email with your exam results. (Note: AA copies the VC and RTC.) __/__/__ • Provide a photo for your badge. This can be done at any time. __/__/__ <p>If you don't pass the exam after two attempts, the AA will send an email to the VC and RTC to suggest further study before attempting the test – the third and final allowed time.</p>	<p>Varies.</p>
<p>6. Mentoring</p>	<ul style="list-style-type: none"> • Meet with the VC who will assign a mentor. __/__/__ 	<p>Varies.</p>
<p>7. Acceptance, certificate and badge</p>	<ul style="list-style-type: none"> • Receive your certificate and badge if you'll counsel clients. __/__/__ • Receive your badge if you'll perform administrative duties only. __/__/__ 	<p>After completion of mentoring.</p>
<p>Next steps for a certified volunteer:</p> <ul style="list-style-type: none"> • You are now a certified SHIBA volunteer and can start working with clients! • Attend a required minimum of eight out of nine monthly continuing education trainings. • Work with your 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 with permission from both VC and RTC. There must be extenuating circumstances for approval.