

Tips for SHIBA volunteers who work from home and phone counsel clients

Many SHIBA volunteers help clients from home via phone counseling. However, some of you are new to at-home phone counseling. Not all the tips below will work for you but feel free to use what does.

Phones

- For privacy purposes, consider blocking your phone number from showing on caller ID. With most phone systems, dialing *67 before dialing the client will block your number.
- If you use your own smart cell phone, consider setting up a free Google Voice app. It allows you to select and use a different phone number from your personal number for calling out and even getting voicemail messages. For more information, type “Google voice help” in your online search tool.
- Many people won’t answer a phone call from a number they don’t recognize. Plan with your local group and volunteer coordinator (VC) ahead of time if or how you will leave a message when you call and what you will say. For example:
 - This <your first and last name> with SHIBA, sorry I missed you, I will call back later, or at (date) (time).
 - This is <your first and last name> with SHIBA, sorry I missed you, here is my Google Voice number.
 - This is <your first and last name> with SHIBA, sorry I missed you, here is our <your local SHIBA office number> or <1-800-562-6900>.

Preparing for a phone session

- Volunteers report it’s helpful to set up a phone appointment with the client if possible, and send any related materials to the client ahead of time.
 - You can email materials, like the Medigap chart, or Part D plan list. You can find the links in the Publications section of My SHIBA at www.insurance.wa.gov/my-shiba.
 - You can order most of the SHIBA publications through the Department of Enterprise Services Fulfillment Center and they will mail them directly to the client for you. See the tutorial on how to set up an account on My SHIBA at:

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www.insurance.wa.gov/sites/default/files/documents/order-publications-guide.pdf.

- Talk to your VC about getting a supply of stamps and envelopes.
- Our office can also help by mailing information to your clients. Send an email with exactly what publications you need mailed, and the client's name and mailing address to: shiba@oic.wa.gov.

Ten tips for effective communication on the phone*

1. Prepare for the call.
2. Be clear about what you want to achieve.
3. Remember the other person has no non-verbal cues.
4. Think about your tone of voice.
5. Make sure you listen carefully.
6. Speak clearly and be succinct.
7. If you don't understand something, ask.
8. Don't be tempted to do other things at the same time.
9. Summarize the conversation so that everybody knows what's expected of them.
10. Voicemails – be clear and keep it short.

*Source: www.englishwithkirsty.com/2015/04/20/10-tips-for-effective-communication-on-the-telephone