Wisconsin State Health Insurance Assistance Program (SHIP)
Part D Counselor Orientation Checklist

# Introduction

**This orientation checklist is for basic-level SHIP counselors who will only assist with Part D plan comparisons.**

You can edit this list to include local onboarding steps and customize learning to your role.

## Live Trainings

**Upcoming trainings** can be found on the [GWAAR SHIP Volunteer Resources page](https://gwaar.org/SHIP-volunteer-resources) under Training.

**Recordings** of live trainings are posted to [Vimeo](https://vimeo.com/showcase/9535365) (password: Medicare101).

# Estimated time commitment

Total time: 6 – 7 hours

* Online courses: 2 hours (depending on previous familiarity with Medicare)
* Live webinars: 5 hours

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# Systems Access

[ ]  Work with your local SHIP supervisor to complete the [User System Access Request
(F-02000)](https://www.dhs.wisconsin.gov/library/collection/f-02000).

[ ]  Request access to the national SHIP TA Center, which includes the Online Counselor Certification and Training (OCCT):

1. Go to <https://portal.shiptacenter.org/Login.aspx>.
2. Click the green “Submit request to be a Registered User.”
3. Answer the emailed request to verify your email address.

[ ]  Request access to the learning management system (LMS):

1. Go to <https://eri-wi.org/adrc-enroll/>.
2. Request access as a “SHIP Counselor (Non-Benefit Specialist).”

[ ]  Check the GWAAR SHIP Volunteer Resources webpage for the agenda of the next live webinar training series dates. The series is offered every spring and fall.

[ ]  Bookmark the following websites:

* Medicare.gov: [www.medicare.gov](http://www.medicare.gov)
* SHIP Technical Assistance (TA) Center: [www.shiptacenter.org](http://www.shiptacenter.org)
* National Council on Aging (NCOA), the MIPPA TA Center: [www.ncoa.org/professionals/benefits/center-for-benefits-access/mippa-resource-center](http://www.ncoa.org/professionals/benefits/center-for-benefits-access/mippa-resource-center)
* GWAAR Medicare Outreach and Assistance Resources:
[www.gwaar.org/medicare-outreach-and-assistance-resources](http://www.gwaar.org/medicare-outreach-and-assistance-resources)
* Learning management system (LMS): <https://eri.litmos.com/account/login>
* Department of Health Services (DHS) Medicare Counseling for Wisconsin Residents: [dhs.wi.gov/medicare-help](https://www.dhs.wisconsin.gov/benefit-specialists/medicare-counseling.htm)

# Curriculum

## General Orientation

### Complete online learning management system courses

[ ]  OCCT Privacy and Confidentiality (30 min.)

☐ OCCT Course 1.1: Health Insurance Terms (35 min.) *(if needed)*

### Complete live training

[ ]  SHIP and MIPPA New Counselor Orientation

PowerPoint: <https://www.dhs.wisconsin.gov/publications/p03019.pdf>

### Save the link to:

[ ]  WI SHIP Cheat Sheet Packet (P-03179a): <https://www.dhs.wisconsin.gov/publications/p03179a.pdf>

## Original Medicare

### Complete online learning management system courses

[ ]  OCCT Course 1.2: Medicare Overview (30 min.) *(if unfamiliar with Medicare)*

[ ]  OCCT Course 1.3: Medicare Options (30 min.)

### Complete live training

[ ]  Medicare Basics

## Prescription Drug Coverage Options

### Complete online learning management system courses

[ ]  OCCT Course 2.3: Part D (Medicare Prescription Drug Benefit) (40 min.)

[ ]  LMS Presentation: SeniorCare

### Complete live training

[ ]  Medicare Part D

## Financial Assistance Programs

### Complete online learning management system courses

[ ]  LMS Presentation: Low-Income Subsidy (30 min.) and Supplemental Resources: Low Income Subsidy

### Watch online video:

[ ]  Limited Income Newly Eligible Transition (LINET) Program: [www.humana.com/member/medicare-linet-advocate-resources](http://www.humana.com/member/medicare-linet-advocate-resources)

### Save links to:

[ ]  DHS Medicaid webpages: <https://www.dhs.wisconsin.gov/medicaid/index.htm>

[ ]  Medicare Savings Program publication: <https://www.dhs.wisconsin.gov/library/p-10062.htm>

[ ]  SeniorCare information: <https://www.dhs.wisconsin.gov/seniorcare/index.htm>

## Medicare.gov Plan Finder

### Complete online learning management system courses

[ ]  LMS Supplemental Resources: PlanFinder Demo

### Complete live training

[ ]  Plan Finder Live Demonstration

# Certification

### After Medicare training is complete:

[ ]  Pass the Basic SHIP Certification Exam:

1. Go to the SHIP TA Center: [www.shiptacenter.org](http://www.shiptacenter.org).
2. Click the green “Training and Certification (OCCT)” button.
3. Click Certification Tool.
4. Click Take Exam.

The exam:

* Is open book.
* Has no time limit.
* Can be saved and returned to later (read the pop-ups carefully).

Email the [Wisconsin SHIP Director](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) with any issues or questions.

# Shadowing

[ ]  Shadow customer contacts and debrief with designated staff afterwards

[ ]  Conduct customer contacts while supervisor or designed staff observes and debrief afterwards

[ ]  Conduct customer contacts independently

[ ]  Participate in ongoing check-ins with supervisor

# Reporting

### Save links to:

[ ]  SHIP Reporting Instructions: <https://www.dhs.wisconsin.gov/publications/p03179.pdf>

[ ]  MIPPA Reporting Instructions: <https://www.dhs.wisconsin.gov/publications/p03087.pdf>

[ ]  SHIP Tracking and Reporting System (STARS) (if applicable): <https://stars.acl.gov>

The [GWAAR Medicare Outreach and Assistance Resources](https://gwaar.org/medicare-outreach-and-assistance-resources) webpage’s “Grantee Reporting Information” section has additional reporting resources.

### If your agency uses STARS, complete online training:

Go to the [SHIP TA Center](https://www.shiptacenter.org/) and click [STARS Resources](https://portal.shiptacenter.org/Portal/Content/STARS-Resources.aspx) on the left-hand toolbar. Complete the following:

[ ]  STARS 101 course

[ ]  STARS Beneficiary Contacts Data Entry Basics webinar

[ ]  STARS Outreach and Education Data Entry Basics

# Directory: SHIP Program Support

|  |  |  |
| --- | --- | --- |
| Your SHIP Supervisor:       |       |       |
| SHIP Director: Michelle Grochocinski | 608-266-3840 | michelle.grochocinski@dhs.wisconsin.gov  |
| MIPPA Director: Pam Watson | 414-758-1282 | pamela.watson@dhs.wisconsin.gov  |
| Senior Medicare Patrol (SMP) Volunteer Coordinator:Susan Krolow |  | susan.krolow@gwaar.org  |
| SHIP Technical Assistance (TA) Center Helpdesk | 877-839-2675 | info@shiptacenter.org  |
| STARS Helpdesk (Booz Allen Help Desk) | 703-377-4424 | boozallenstarshelpdesk@bah.com  |
| PeerPlace Technical Assistance: Bureau of Aging and Disability Resources (BADR) Tech Team |  | DHSBADRTech@dhs.wisconsin.gov  |

# Directory: Helplines

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| Board on Aging and Long Term Care (BOALTC) Medigap Helpline | 800-242-1060 | BOALTCMedigap@wisconsin.gov  |
| BOALTC Medigap Part D and Prescription Drug Helpline | 855-677-2783 | BOALTCRXHelpline@wisconsin.gov  |
| [Disability Benefit Specialist, Office for the Deaf and Hard of Hearing](https://www.dhs.wisconsin.gov/odhh/benefits.htm): Jennifer Koehn | 262-347-3045 Videophone | jenniferm.koehn@dhs.wisconsin.gov |
| Judicare Legal Aid (for Tribal members) | 800-472-1638 |  |
| LINET Advocacy Helpline for SHIP Counselors | 866-934-2019 | LINETOutreach@humana.com |
| LINET Help Desk for Beneficiaries and Pharmacies | 800-783-1307 | MedicareLINET@CMS.hhs.gov |
| Medicaid Member Services | 800-362-3002 | [​Guidelines for Using ForwardHealth Partners Inbox (P-02009 21-06)](https://www.dhs.wisconsin.gov/publications/p02009-21-06.pdf) |
| Medicare National Helpline: 1-800-MEDICARE | 800-633-4227 |  |
| Non-Emergency Medicaid Transportation Helpdesk |  | DHSNEMTInfo@dhs.wisconsin.gov |
| Senior Medicare Patrol (SMP) | 888-818-2611 |  |
| SeniorCare Helpline | 800-657-2038 |  |
| SHIP TA Center: Medicare Help Inbox |  | medicarehelp@shiptacenter.org  |