# **Basic State Health Insurance Assistance Program (SHIP) Counselor Orientation Checklist**

**This optional orientation checklist is designed for basic-level SHIP counselors** who will be assisting with one-on-one counseling or Medicare outreach. Local supervisors can edit this template to include local onboarding steps. Benefit specialists should refer to the training curriculum offered by their program attorney instead of this form.

An [abbreviated recommended curriculum](https://eri.litmos.com/course/2120403/module/5872866?moduletoken=6Cjdus7u-FLCkhI8tscI6p~bxAydG65W2-zrDbFm0~HI~S0LMFr1JFYJlOrCfps4&LPId=101629) is available for those who only assist with Part D plan comparisons.

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

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| Topic | Action Steps and Materials | Completed  |
| Systems Access(Complete if you haven’t already) | [ ]  Work with your local SHIP supervisor to complete the [User System Access Request Instructions (F-02000)](https://www.dhs.wisconsin.gov/library/collection/f-02000) and securely email it to the SHIP director at michelle.grochocinski@dhs.wisconsin.gov. [ ]  Request access to the national SHIP Technical Assistance (TA) Center, which includes the Online Counselor Certification and Training (OCCT): Go to <https://portal.shiptacenter.org/Login.aspx> and click the green “Submit request to be a Registered User.” Answer the emailed request to verify your email address.[ ]  Request access to the learning management system (LMS): Go to <https://eri-wi.org/adrc-enroll/> and request access as a “SHIP Counselor (Non-Benefit Specialist)”[ ]  Check the [GWAAR SHIP Volunteer Resources webpage](https://gwaar.org/SHIP-volunteer-resources) 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:[gwaar.org/medicare-outreach-and-assistance-resources](https://gwaar.org/medicare-outreach-and-assistance-resources)
* Learning management system: [eri.litmos.com/account/login](https://eri.litmos.com/account/login)
* DHS Medicare Counseling for Wisconsin Residents: [dhs.wi.gov/medicare-help](https://www.dhs.wisconsin.gov/benefit-specialists/medicare-counseling.htm)
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| General Orientation | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  OCCT Privacy and Confidentiality (30 min.)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](https://eri.litmos.com/account/login) courses:[ ]  OCCT Course 1.1: Health Insurance Terms (35 min.)[ ]  OCCT Course 1.2: Medicare Overview (30 min.)[ ]  OCCT Course 1.3: Medicare Options (30 min.)[ ]  OCCT Course 3.4: Enrollment Penalties and IRMAA (35 min.)[ ]  OCCT Course 2.1: Part A (Hospital Insurance) (40 min.)[ ]  OCCT Course 2.2 Part B (Medicare Insurance) (40 min.)Complete live training:[ ]  Medicare Basics |       |
| Medicare Supplement Policies (a.k.a. Medigap) | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  LMS Presentation: Medigap (30 min.) and Supplemental Resources: Medigap[ ]  OCCT Course 4.1: Medicare and Employer Insurance (35 min.)[ ]  OCCT Course 4.2: Medicare and Other Insurances (30 min.)Complete live training:[ ]  Medicare SupplementsSave links to:[ ]  OCI’s Wisconsin Guide to Health Insurance for People with Medicare: <https://oci.wi.gov/Pages/Consumers/PI-002.aspx> [ ]  OCI’s Medicare Supplement Insurance Policies List: <https://oci.wi.gov/Pages/Consumers/PI-010.aspx>  |       |
| Medicare Advantage (a.k.a. Part C) | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  OCCT Course 2.5: Medicare Advantage Plans (35 min.)Complete live training:[ ]  Medicare Advantage  |       |
| Prescription Drug Coverage Options | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  OCCT Course 2.3: Part D (Medicare Prescription Drug Benefit) (40 min.)[ ]  LMS Presentation: SeniorCareComplete live training:[ ]  Medicare Part D |       |
| Financial Assistance Programs | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  OCCT Course 4.3: Medicare and Medicaid (45 min.) with Supplemental Resource: OCCT 4.3 Slides with notes about WI[ ]  LMS Presentation: Medicare Savings Programs (14 min.)[ ]  LMS Presentation: Low-Income Subsidy (30 min.) and Supplemental Resources: Low Income SubsidyWatch 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) Complete live training:[ ]  Help with Medicare CostsSave 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](https://eri.litmos.com/account/login) courses:[ ]  LMS Supplemental Resources: PlanFinder DemoComplete live training:[ ]  Plan Finder Live Demonstration |       |
| Senior Medicare Patrol | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  LMS Senior Medicare Patrol (SMP) 101 PresentationSave links to:[ ]  Senior Medicare Patrol: [www.smpwi.org](http://www.smpwi.org/)  |       |
| Appeals | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  OCCT Course 3.1: Original Medicare Health Appeals (45 min.)[ ]  OCCT Course 3.3: Medicare Part D Drug Appeals (35 min.) [ ]  OCCT Course 3.2: Medicare Advantage Health Appeals (60 min.)[ ]  LMS Supplemental Resources: Medicare Appeals |  |
| Additional Training Topics | Complete online [learning management system](https://eri.litmos.com/account/login) courses:[ ]  OCCT Medicare Coverage of Durable Medical Equipment (DME) (40 min.)[ ]  LMS Presentation: ACA (12 min.)[ ]  LMS Presentation: COBRA (8 min.)Ask your supervisor if you should complete the following learning management system courses:[ ]  OCCT Medicare and End Stage Renal Disease (ESRD) (75 min.)[ ]  OCCT Medicare and Hospital Discharge Planning (51 min.) |       |
| 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, Michelle Grochocinski, at michelle.grochocinski@dhs.wisconsin.gov with any issues or questions. |       |
| Observation and Shadowing(recommended) | [ ]  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](https://portal.shiptacenter.org/Portal/News/News-Detail.aspx?NewsGUID=cd4f58ef-1386-4a2c-a55e-34783a9542ca)[ ]  [STARS Beneficiary Contacts Data Entry Basics webinar](https://portal.shiptacenter.org/Portal/Resource/Resource-Detail.aspx?ResourceGUID=B4AF8B3A-3DCE-4437-B92E-D3ACC66F66AB)[ ]  [STARS Outreach and Education Data Entry Basics](https://portal.shiptacenter.org/Portal/Resource/Resource-Detail.aspx?ResourceGUID=D6E807C6-AA55-4FF2-BD7F-BF6F34946297)  |       |

# **Directory: SHIP Program Support**

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| Local SHIP Supervisor:       |       |       |
| SHIP Director: Michelle Grochocinski | 608-266-3840 | michelle.grochocinski@dhs.wisconsin.gov  |
| MIPPA Grant Program Coordinator: Pam Watson | 414-758-1282 | pamela.watson@dhs.wisconsin.gov  |
| State Volunteer Program Coordinator: Sam Margelofsky |  | samantha.margelofsky@dhs.wisconsin.gov  |
| Senior Medicare Patrol (SMP) Volunteer Coordinator:Molly Kelly |  | molly.kelly@gwaar.org  |
| SHIP TA Center Helpdesk | 877-839-2675 | info@shiptacenter.org  |
| STARS Helpdesk (Booz Allen Help Desk) | 703-377-4424 | boozallenstarshelpdesk@bah.com  |
| WellSky Technical Assistance: Bureau of Aging and Disability Resources (BADR) Tech Team |  | DHSBADRTech@dhs.wisconsin.gov  |
| WellSky Training Specialist: Doug Holmes | 608-261-5989 | douglas.holmes@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 Rights Wisconsin Part D Helpline | 800-926-4862 | Ginger.Rogers@drwi.org  |
| Disability Benefit Specialist,Office for the Deaf and Hard of Hearing: 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 | 800-MEDICARE |  |
| 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  |