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

# Introduction

**This orientation checklist is for basic-level SHIP counselors** who will be assisting with one-on-one counseling or Medicare outreach.

* An [abbreviated curriculum](https://www.dhs.wisconsin.gov/benefit-specialists/ship-counselor-checklist-d.docx) is available for counselors who work only with Part D.
* Benefit specialists should refer to the training curriculum offered by their program attorney instead of this form.

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).

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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.)

### 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 1.1: 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 (Medigap)

### Complete online learning management system 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 Supplements

### Save 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 (Part C)

### Complete online learning management system courses

OCCT Course 2.5: Medicare Advantage Plans (35 min.)

### Complete live training

Medicare Advantage

## 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

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 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)

### Complete live training:

Help with Medicare Costs

### 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

## Senior Medicare Patrol

### Complete online learning management system courses

LMS Senior Medicare Patrol (SMP) 101 Presentation

### Save links to:

Senior Medicare Patrol: [www.smpwi.org](http://www.smpwi.org)

## Appeals

### Complete online learning management system 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 Topics

### Complete online learning management system 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 courses:

OCCT Medicare and End Stage Renal Disease (ESRD) (75 min.)

OCCT Medicare and Hospital Discharge Planning (51 min.)

OCCT Medicare and Military Health Benefits

# 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

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| --- | --- | --- |
| Your SHIP Supervisor: |  |  |
| SHIP Director: Michelle Grochocinski | 608-266-3840 | [michelle.grochocinski@dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| MIPPA Director: Pam Watson | 414-758-1282 | [pamela.watson@dhs.wisconsin.gov](mailto:pamela.watson@dhs.wisconsin.gov) |
| Senior Medicare Patrol (SMP) Volunteer Coordinator: Susan Krolow |  | [susan.krolow@gwaar.org](mailto:susan.krolow@gwaar.org) |
| SHIP Technical Assistance (TA) Center Helpdesk | 877-839-2675 | [info@shiptacenter.org](mailto:info@shiptacenter.org) |
| STARS Helpdesk (Booz Allen Help Desk) | 703-377-4424 | [boozallenstarshelpdesk@bah.com](mailto:boozallenstarshelpdesk@bah.com) |
| PeerPlace Technical Assistance: Bureau of Aging and Disability Resources (BADR) Tech Team |  | [DHSBADRTech@dhs.wisconsin.gov](mailto: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](mailto:BOALTCMedigap@wisconsin.gov) |
| BOALTC Medigap Part D and Prescription Drug Helpline | 855-677-2783 | [BOALTCRXHelpline@wisconsin.gov](mailto: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](mailto: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](mailto:medicarehelp@shiptacenter.org) |