



Training Checklist: Intake

Volunteer: _____ Start Date: _____
 Email: _____ Phone: _____

Training Topic	Date Completed
SHIP orientation	
Review SHIP standards and policies	
Agency orientation, including review of agency-specific reference materials	
Attend a SHIP meeting	
Review Understanding Medicare Module	
Shadow SHIP coordinator to learn about: Active listening Problem-solving Tasks required by role	
Shadow other volunteer CREW roles	
Review all 12 of CMS's self-study Medicare modules	
Have a working knowledge of the following topics: Parts A&B Medicare Advantage Part D Extra Help/LIS, SSA VPharm Medigap	
Become familiar with SHIP partners and acronyms	
Attend Basic Computer Training (as needed)	
Write-up short bio to be shared through agency newsletter	
To become Educator, have a working knowledge of the following topics: Preventive benefits Coordination of Benefits MSP/Medicaid SHIPTalk	

Additional Volunteer Information
Availability (circle): AM: Mon Tues Wed Thur Fri PM: Mon Tues Wed Thur Fri
Special Skills: _____
Language Skills: _____
Able to Drive: _____