



Training Checklist: Marketer

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	
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 at least one health fair or outreach event	
Attend Communications or Presentations skills training	
Demonstrate presentation skills	
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: _____