

## **Competency “Testing”**

### **Connecticut CHOICES**

CHOICES has been using pre-tests and post-tests with its new volunteers for several years. At the beginning of each day of initial training, volunteers take a pre-test to see how much they know about the topics that will be covered. Then, at the end of each day, volunteers take a post-test to find out how much they've learned. Volunteers need to pass each post-test with a score of 90% or higher to become certified as CHOICES counselors. New volunteers who do not pass the post-tests are either invited to attend another training or given one-on-one assistance so they can learn the material.

CHOICES is currently in the process of creating a new online training and certification tool for its volunteers. During the first year, volunteers will test the tool and help CHOICES figure out where it should focus its training efforts. Later, volunteers will take an annual re-certification “test” to remain certified as CHOICES counselors. This re-certification process will help ensure that volunteers are retaining the Medicare-related information they learned during their initial and update trainings.

### **Indiana SHIP**

Volunteers take a 115 question competency “test” on the last day of their initial training. After everyone has completed the test, the class discusses the questions and identifies the correct answers. This helps volunteers immediately see how well they did and prevents them from leaving the training with misinformation. If a new volunteer doesn't do well on a particular Medicare-related topic, his or her Area Manager will provide more assistance and training. However, if a new volunteer does very poorly on the test, he or she will not be certified and will need to re-take the initial training.

### **Iowa SHIIP**

SHIIP uses competency “testing” in two ways: following the initial training and as part of re-certification. After the initial training, new volunteers complete a 54-question review. Volunteers take the review online using SHIPTools, the SHIIP online training and reporting system. The review is open book and is not scored. It helps check what volunteers learned in training and also reminds them where to find information in their SHIIP handbooks. Once volunteers complete this review, SHIIP staff can see which questions volunteers had trouble with and identify possible topics for further training.

All SHIIP volunteers also take an annual certification review using SHIPTools. A four year rotation of topics (e.g. Medicare A&B, Medicare Part D/Medicare Advantage, Medicare supplement/Other health insurance and LTC Insurance/Medicaid) is used so that every four years all subject matter is reviewed. The review gets volunteers back into their handbooks to review and brush up on the selected topic. To be re-certified,

volunteers have to complete this review, attend 12 hours of update training, and submit at least 12 counseling reports per year.

### **Maine SHIP**

The Maine SHIP has created several quizzes and exams to check volunteer and staff knowledge on various Medicare topics. These quizzes and exams correspond with the Medicare CD Suite Training Modules and additional Maine specific modules available on the Maine DHHS - Office of Elder Services (OES) Website. Volunteers and staff can currently take these quizzes and exams online. Once completed, these exams and quizzes are scored automatically through Maine's OES website. To prevent potential misuse of the site or the information it contains, Maine has opted to restrict access to this site. Maine requires a user name and password to access the Training Modules and testing materials. Restricting access to this information also helps limit any potential liability issues associated with misuse of the site.

Maine SHIP's quizzes and exams prepare volunteers and staff for the formal testing available through Maine's pilot participation in the online certification tool offered by the SHIP Resource Center.

The Maine SHIP still uses face-to-face training as much as possible. Online training and testing opportunities supplement this traditional training method. For example, after participants complete the initial training, the online piece is used as a post-training review for volunteers and staff.

### **Massachusetts SHINE**

New SHINE volunteers complete a competency "exam" after they finish 11 days of initial training. The exam includes a combination of multiple choice questions and more in-depth case studies. It's a "take-home" test and volunteers have two weeks to finish it. Then, they send the test back to SHINE and it is graded. Volunteers must get at least 70% on the exam to pass. Volunteers that score between 60 - 70% can be re-trained on the material the volunteer was deficient in. However, volunteers that score less than 60% have to retake the initial training. Once the grading is complete, volunteers attend their final day of initial training. They review the exam answers, participate in a cultural competency exercise, and review counseling guidelines. Then, each volunteer receives a SHINE certificate of completion.

Each spring, volunteers are re-certified using another competency "exam." The exam generally includes 6 - 8 case studies to assess volunteers' knowledge and skills. Volunteers must pass the test to be re-certified as SHINE counselors.

### **Nebraska SHIIP**

In 2007, the Nebraska SHIIP began having volunteers take a “re-certification” at its annual spring update training. The re-certification is a 30 item, multiple-choice questionnaire about a section of the SHIIP training manual. Volunteers have approximately thirty minutes to complete the re-certification and can use their manuals to find the correct answers. Then, everyone discusses the questions and correct answers. The re-certifications are collected and “graded” at the state SHIIP office. If there are any areas that volunteers need to brush up on, they receive additional training to bring them up to speed.

The Nebraska SHIIP has found it’s very useful to create questions directly from the training manual and then allow volunteers to use their manuals to find the answers. This encourages volunteers to re-visit and become more familiar with their manuals. They get more comfortable with where to find information and also get a refresher on the Medicare-related information.

### **Oregon SHIBA**

As part of the initial training, new volunteers complete eight online “[quizzes](#).” The state SHIBA office responds to and grades the quizzes, and lets local coordinators know how well their new volunteers have done. If volunteers have difficulty passing any of the quizzes, their coordinator (or mentor) will help them improve in that subject area. Both coordinators and volunteers appreciate this feedback. Additionally, SHIBA has found that the online quizzes can sometimes help to identify those few volunteers who may not be appropriate to counsel beneficiaries based on their (lack of) understanding of the training material or communication skills.