

Iowa SHIIP Training and Certification Program

Initial Training

The Iowa Senior Health Insurance Information Program (SHIIP) offers a 6-day, 36-hour initial training for its new volunteers. The training teaches volunteers about all Medicare benefits and related topics, including Medicare supplement insurance, employer provided retiree health plans, Medicaid, Long Term Care Insurance, and other health insurance options. As part of the training, volunteers spend one full day in a computer lab, where they learn how to use the Medicare website, complete online reporting, and more.

Update Training

SHIIP volunteers are required to attend 12 hours of update training per year. Volunteers are permitted to miss one update training (out of three), as long as they make it up. Various make-up options are used, including watching or listening to a recording of the training or participating in a teleconference. After the make-up session, volunteers must complete a worksheet to receive credit for the update.

Competency “Testing”

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.

Mentoring

After volunteers complete the initial training, they are encouraged (but not required) to co-counsel with an experienced SHIIP volunteer. SHIIP plans to encourage this practice more in the future, as it can help new volunteers gain experience and confidence.

Advice from the Iowa SHIIP

Tell individuals about your SHIP training and certification requirements when you recruit them to be volunteers. You can't spring it on them after they've been through the training – it has to be in their job description. And, don't make it sound like less than it really is. It's important for volunteers to understand what will be required of them.

If you're developing new training or certification requirements, it pays to include your existing volunteers and staff in that process. Ask for their ideas. They always have good suggestions and can help you design requirements that will be realistic and volunteer-friendly.

You also need to plan for what you'll do if people have trouble meeting your requirements. And, whatever you decide on, stick with it. We had a problem with this in previous years, but established clearly the requirements and consequences this past year and so far, only 4% of volunteers are having trouble meeting the requirements.

Aside from training and certification, one of our most effective quality control measures is providing volunteers with a 1-800 number that they can call with questions or problems. The phone line is answered by two SHIIP staff with subject-matter knowledge. Volunteers really appreciate having the hotline available to them. It gives them a resource so they are never tempted to give out inaccurate information.