

Massachusetts SHINE Training and Certification Program

Initial Training

The Massachusetts SHIP, the Serving Health Information Needs of Elders (SHINE) program, provides its new volunteers with a 12-day, 48-hour initial training. Volunteers complete the course by attending 1 - 2 days of training per week for approximately 6 - 12 weeks. New SHINE volunteers learn about Medicare Parts A, B, and D, Medicare Advantage, Medigap, Medicaid, Long Term Care, the Massachusetts SPAP, and other insurance options.

Before attending the initial training, volunteers receive a welcome letter and the first two chapters of their SHINE training manual. They are asked to read these chapters before the first day of class, so they are prepared to discuss the material and ask questions. Volunteers receive the rest of their training manuals on the first day of training. They are assigned additional chapters to read prior to each class. Then, during each day of SHINE training, volunteers spend the morning reviewing important concepts and the afternoon applying those concepts using case studies.

Update Training

SHINE volunteers attend monthly update training to keep up on the latest Medicare information. The update trainings are mandatory, but volunteers are permitted to miss two per year. Volunteers are also required to pass a criminal background check, serve 4 - 6 hours per month, and commit to volunteering with SHINE for at least 2 years.

Competency “Testing”

New 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.

Mentoring

After volunteers complete the initial training and competency “exam,” they are matched with experienced mentors. The mentors may be fellow counselors or Regional SHINE Directors. New volunteers shadow their mentors for approximately six counseling sessions, as they meet with clients or make phone calls. After a couple of sessions, the new volunteers begin counseling clients and their mentors are present to observe and assist. Once they’re comfortable, volunteers begin helping clients independently.

Exercises

SHINE has developed 8 – 10 case studies for each chapter of its training manual. SHINE has found that these exercises are the best way for new volunteers to learn and apply Medicare concepts. During each day of initial training, volunteers spend the afternoon practicing with case studies and role-playing.

Volunteers are also sometimes assigned homework exercises. For instance, volunteers may be asked to call 1-800-Medicare or another organization with a SHINE question or problem. This helps volunteers get used to contacting other agencies and also helps them learn who to contact about specific Medicare issues.

Advice from SHINE

This is how we make sure that our SHINE volunteers are fully trained and know where to find the information they need to counsel beneficiaries. Our program is unique in many ways, but it’s the way that we’ve evolved and the process that works best for us. For instance, our initial training is quite long and we do extensive counseling and application assistance for beneficiaries on Medicaid. These ideas may not work for some SHIPs, but they sure are working for us!