

Oregon SHIBA Training and Certification Program

Initial Training

Oregon's SHIP, the Senior Health Insurance Benefits Assistance (SHIBA) program, uses three steps to train its new volunteers. First, volunteers learn about Medicare through eight online training modules. They self-study at their own pace and complete [eight online quizzes](#) to demonstrate what they've learned. When it is available in their area, new volunteers attend a 2-day, 12-hour training to learn even more about Medicare. SHIBA has found that these two initial training methods complement one another very effectively.

Competency "Testing"

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.

Mentoring

For the third piece of preparation, new volunteers are paired with experienced SHIBA mentors. Volunteers spend at least 10 hours shadowing their mentors, until they feel ready to try counseling on their own. The method of shadowing varies according to the local program. Where possible, mentoring is done in person. If that's not possible, it can also be done remotely by phone or via the Internet. Once new volunteers are ready to counsel independently, they apply for a Unique ID and receive an official name badge that bears the State seal.

Update Training

Volunteers are encouraged to participate in any update trainings that are available, including bi-monthly meetings with their SHIBA Coordinator, visits from field officers, and regional presentations by CMS liaisons. Regular updates are also sent to volunteers through a weekly digest e-newsletter, the SHIBA Bulletin.

Advice from Oregon SHIBA

It's important to listen to your SHIP Volunteers and Coordinators. Be flexible, pay attention to their needs, and design a training and certification program that is best suited to help them succeed. Also, don't be afraid to find out what other SHIPs are doing. It's OK to "steal" from the best!