Basic State Health Insurance Assistance Program (SHIP) Counselor Orientation Checklist

This orientation checklist is designed for basic-level SHIP counselors who will be assisting with one-on-one counseling or Medicare outreach. Benefit specialists should refer to the training curriculum offered by their program attorney instead of this form.

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| **Local SHIP Supervisor:** |  |  |
| **Wisconsin SHIP Director**: Michelle Grochocinski | 608-266-3840 | [michelle.grochocinski@dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) |
| **Board on Aging and Long-Term Care Medigap Helpline** | 800-242-1060 | [BOALTCMedigap@wisconsin.gov](mailto:BOALTCMedigap@wisconsin.gov) |
| **Medigap Part D and Prescription Drug Helpline** | 855-677-2783 | [BOALTCRXHelpline@wisconsin.gov](mailto:BOALTCRXHelpline@wisconsin.gov) |
| **Disability Rights Wisconsin Part D Helpline** | 800-926-4862 | [Ginger.Rogers@drwi.org](mailto:Ginger.Rogers@drwi.org) |

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| Topic | Action Steps and Materials | Completed |
| Systems Access (complete if you haven’t already) | Work with your local SHIP supervisor to complete the [ADRC/Aging/Tribal User System Access Request Instructions (F-02000)](https://www.dhs.wisconsin.gov/library/f-02000.htm) and securely email it to the SHIP director at [michelle.grochocinski@dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov).  Request access to the national SHIP Technical Assistance (TA) Center:  Go to <https://portal.shiptacenter.org/Login.aspx> and click the green “Submit request to be a Registered User”  Request access to the learning management system:  Go to <https://eri-wi.org/adrc-enroll/> and request access as a SHIP Counselor (Non-Benefit Specialist)  Bookmark the following websites:   * Medicare.gov: [www.medicare.gov](http://www.medicare.gov) * SHIP Technical Assistance (TA) Center: [www.shiptacenter.org](http://www.shiptacenter.org) * National Council on Aging (NCOA), the MIPPA TA Center:  [www.ncoa.org/professionals/benefits/center-for-benefits-access/mippa-resource-center](http://www.ncoa.org/professionals/benefits/center-for-benefits-access/mippa-resource-center) * GWAAR Medicare Outreach and Assistance Resources: [gwaar.org/medicare-outreach-and-assistance-resources](https://gwaar.org/medicare-outreach-and-assistance-resources) * Learning management system: [eri.litmos.com/account/login](https://eri.litmos.com/account/login) * DHS Medicare Counseling for Wisconsin Residents:  [dhs.wi.gov/medicare-help](https://www.dhs.wisconsin.gov/benefit-specialists/medicare-counseling.htm) |  |
| General Orientation | Complete online learning management system courses: OCCT Privacy and Confidentiality (30 min.) Complete live training: Monday April 8, 2024, 10a.m.-11a.m. – Basic SHIP Counselor Orientation  PowerPoint: <https://www.dhs.wisconsin.gov/publications/p03019.pdf> Log in to the SHIP TA Center and download: [Common Medicare Acronyms](https://portal.shiptacenter.org/Portal/Resource/Resource-Detail.aspx?ResourceGUID=9ED55BDC-C916-43AC-825D-D6961B3247A9)  [WI SHIP Cheat Sheet Packet](https://portal.shiptacenter.org/Portal/Resource/Resource-Detail.aspx?ResourceGUID=A80B68F8-3993-42A6-A94A-CECCD4EF6E77) |  |
| Original Medicare | Complete online learning management system courses: OCCT Course 1.1: Health Insurance Terms (35 min.)  OCCT Course 1.2: Medicare Overview (30 min.)  OCCT Course 1.3: Medicare Options (30 min.)  OCCT Course 3.4: Enrollment Penalties and IRMAA (35 min.)  OCCT Course 2.1: Part A (Hospital Insurance) (40 min.)  OCCT Course 2.2 Part B (Medicare Insurance) (40 min.) Complete live training: Tuesday April 9, 2024, 10a.m.-12p.m. - Original Medicare Basics |  |
| Medicare Supplement Policies  (a.k.a. Medigap) | Complete online learning management system courses: Presentation: Medigap (30 min.) and Supplemental Resources: Medigap  OCCT Course 4.1: Medicare and Employer Insurance (35 min.)  OCCT Course 4.2: Medicare and Other Insurances (30 min.) Complete live training: Thursday April 11, 2024, 10a.m.-11a.m. – Medicare Supplements Save links to: OCI’s Wisconsin Guide to Health Insurance for People with Medicare:  <https://oci.wi.gov/Pages/Consumers/PI-002.aspx>  OCI’s Medicare Supplement Insurance Policies List:  <https://oci.wi.gov/Pages/Consumers/PI-010.aspx> |  |
| Medicare Advantage  (a.k.a. Part C) | Complete online learning management system courses: OCCT Course 2.5: Medicare Advantage Plans (35 min.) Complete live training: Tuesday April 16, 2024, 10a.m.-12p.m. – Medicare Advantage Basics |  |
| Prescription Drug Coverage Options | Complete online learning management system courses: OCCT Course 2.3: Part D (Medicare Prescription Drug Benefit) (40 min.)  Presentation: SeniorCare Complete live training: Thursday April 18, 2024, 10a.m.-12p.m. – Medicare Part D Basics |  |
| Financial Assistance Programs | Complete online learning management system courses: OCCT Course 4.3: Medicare and Medicaid (45 min.) with Supplemental Resource: OCCT 4.3 Slides with notes about WI  Presentation: Medicare Savings Programs (14 min.)  Presentation: Low-Income Subsidy (30 min.) and Supplemental Resources: Low Income Subsidy Complete online training: Limited Income Newly Eligible Transition (LINET) Program:  [www.humana.com/member/medicare-linet-advocate-resources](http://www.humana.com/member/medicare-linet-advocate-resources) Save links to: DHS Medicaid webpages:  <https://www.dhs.wisconsin.gov/medicaid/index.htm>  Medicare Savings Program information:  <https://www.dhs.wisconsin.gov/library/p-10062.htm>  SeniorCare information:  <https://www.dhs.wisconsin.gov/seniorcare/index.htm> |  |
| Medicare.gov  Plan Finder | Complete online learning management system courses: Supplemental Resources: PlanFinder Demo Complete live training: Friday April 19, 2024, 10-11:30a.m. – Medicare Plan Finder Overview |  |
| Senior Medicare Patrol | Complete online learning management system courses: Senior Medicare Patrol (SMP) 101 Presentation Save links to: Senior Medicare Patrol: [www.smpwi.org](http://www.smpwi.org/) |  |
| Appeals | Complete online learning management system courses: OCCT Course 3.1: Original Medicare Health Appeals (45 min.)  OCCT Course 3.3: Medicare Part D Drug Appeals (35 min.)  OCCT Course 3.2: Medicare Advantage Health Appeals (60 min.)  Supplemental Resources: Medicare Appeals |  |
| Additional Training Topics | Complete online learning management system courses: OCCT Medicare Coverage of Durable Medical Equipment (DME) (40 min.)  Presentation: ACA (12 min.)  Presentation: COBRA (8 min.) Ask your supervisor if you should complete the following learning management courses: OCCT Medicare and End Stage Renal Disease (ESRD) (75 min.)  OCCT Medicare and Hospital Discharge Planning (51 min.) |  |
| Certification | After Medicare training is complete:  Pass the SHIP Certification Exam:   1. Go to the SHIP TA Center: [www.shiptacenter.org/](http://www.shiptacenter.org/). 2. Click the green “Training and Certification (OCCT) button. 3. Click Certification Tool. 4. Click Take Exam.   The exam:   * Is open book. * Has no time limit. * Can be saved and returned to later (read the pop-ups carefully).   Email the Wisconsin SHIP director, Michelle Grochocinski, at [michelle.grochocinski@dhs.wisconsin.gov](mailto:michelle.grochocinski@dhs.wisconsin.gov) with any issues or questions. |  |
| Observation and Shadowing (recommended) | Shadow customer contacts and debrief with designated staff afterwards  Conduct customer contacts while supervisor/designed staff observes and debrief with supervisor/designated staff after  Conduct customer contacts independently  Ongoing check-ins with supervisor |  |
| Reporting | Save links to: SHIP Reporting Instructions:  <https://www.dhs.wisconsin.gov/publications/p03179.pdf>  MIPPA Reporting Instructions:  <https://www.dhs.wisconsin.gov/publications/p03087.pdf>  *If your agency uses STARS:*  SHIP Tracking and Reporting System (STARS): <https://stars.acl.gov>  The [GWAAR Medicare Outreach and Assistance Resources](https://gwaar.org/medicare-outreach-and-assistance-resources) webpage’s  “Grantee Reporting Information” section has additional reporting resources. **If your agency uses STARS,** complete online training: Go to the [SHIP TA Center](https://www.shiptacenter.org/) and click “STARS” on the left-hand toolbar. Watch the following webinars:  Beneficiary Contacts – General  Beneficiary Contacts – MIPPA-Qualifying  Group Outreach and Media Outreach |  |

# Virtual Meeting Invitations

To Register for the trainings please sign up through these links: <https://gwaar.org/api/cms/viewFile/id/2008069>

* **Monday, April 8, 10 a.m.–11 a.m.**   
  **Basic SHIP Counselor Orientation** by Pamela Watson, Department of Health Services
  + [Zoom Link](https://drwi-org.zoom.us/j/82308970356?pwd=K0xflgH6MqNleBk5h25MAuSACVz4fb.1)
  + Slides: <https://www.dhs.wisconsin.gov/publications/p03019.pdf>
* **Tuesday, April 9, 10 a.m.–12 p.m  
  Original Medicare Basics** by Ginger Rogers, Disability Rights Wisconsin
  + [Zoom Link](https://drwi-org.zoom.us/j/81955525122?pwd=cXlG4O8brQqEOeiec47MtrbIlv9o9B.1)
  + Slides: <https://gwaar.org/api/cms/viewFile/id/2007771>
* **Thursday, April 11, 10 a.m.–11 a.m.**   
  **Medicare Supplements** by Vickie Buchholz, Board on Aging and Long-Term Care
  + [Zoom Link](https://drwi-org.zoom.us/w/84502248278?tk=GT1LOJApNCS9fay4i8o_Vgdza0EZszje7cOrYK3Tb9w.DQYAAAATrLn7VhZnX2xKTjhWTFF4aTBRSWhGRk1tOENRAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA&pwd=laucdq9kZda7B1hShuCrmkCIf7sVGP.1)
  + Slides: <https://gwaar.org/api/cms/viewFile/id/2007774>
* **Tuesday, April 16, 10 a.m.–12 p.m.**   
  **Medicare Advantage Basics** by Ginger Rogers, Disability Rights Wisconsin
  + [Zoom Link](https://drwi-org.zoom.us/w/82203773878?tk=KmanxBK3ag_vGwd00f9Sn6C_-mbFYa3YCc7bDCeapdI.DQYAAAATI7oLthZDMTYwZ2lEWFJ4eTd3YTFwc29oMWlRAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA&pwd=JFqeLc072U21su8pp447aSbeEq4aap.1)
  + Slides: <https://gwaar.org/api/cms/viewFile/id/2007772>
* **Thursday, April 18, 10 a.m.–12 p.m   
  Medicare Part D** **Basics** by Ginger Rogers, Disability Rights Wisconsin
  + [Zoom Link](https://drwi-org.zoom.us/w/88339845897?tk=C2ROUmthfmL2XDFCdzos-GN4lJZNdavlXGAIeKAYvik.DQYAAAAUkXcTCRZ6NUxqRk5JQlFhdTkyOUZDMGVVX1lRAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA&pwd=PSyKDZ6BnVNjsr9XC6X5zEtm1aagKm.1)
  + Slides:
* **Friday, April 19, 10 a.m.–11:30 a.m.**   
  **Medicare Plan Finder Overview** by Ginger Rogers, Disability Rights Wisconsin
  + [Zoom Link](https://drwi-org.zoom.us/w/88025392769?tk=UqVj1dgc33-gpZfipqv3pWGOJEeOxH_8JL1ZzjMGSMg.DQYAAAAUfrjmgRY3am8zVTVfaFRqeVUzZFVMTmVVTHp3AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA&pwd=xulZpcY2UIupquTlWjzpJ4WVWD1CqD.1)
  + Slides:

**Recordings** are posted to Vimeo: <https://vimeo.com/showcase/9535365> (password: Medicare101).