

SHIP Professional Volunteers and Partnerships

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Grant disclaimer

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Objectives

- Identify how to maximize the impact of a partnership
- Learn when and how to refer prospective professional volunteers
- Review conflict of interest rules regarding professional partnerships


A **professional SHIP volunteer** is a person who has joined the SHIP network and provides SHIP services, though their salary is not funded by SHIP or MIPPA grant dollars.



Clinic staff



Social workers



Case managers

Types of Partnerships

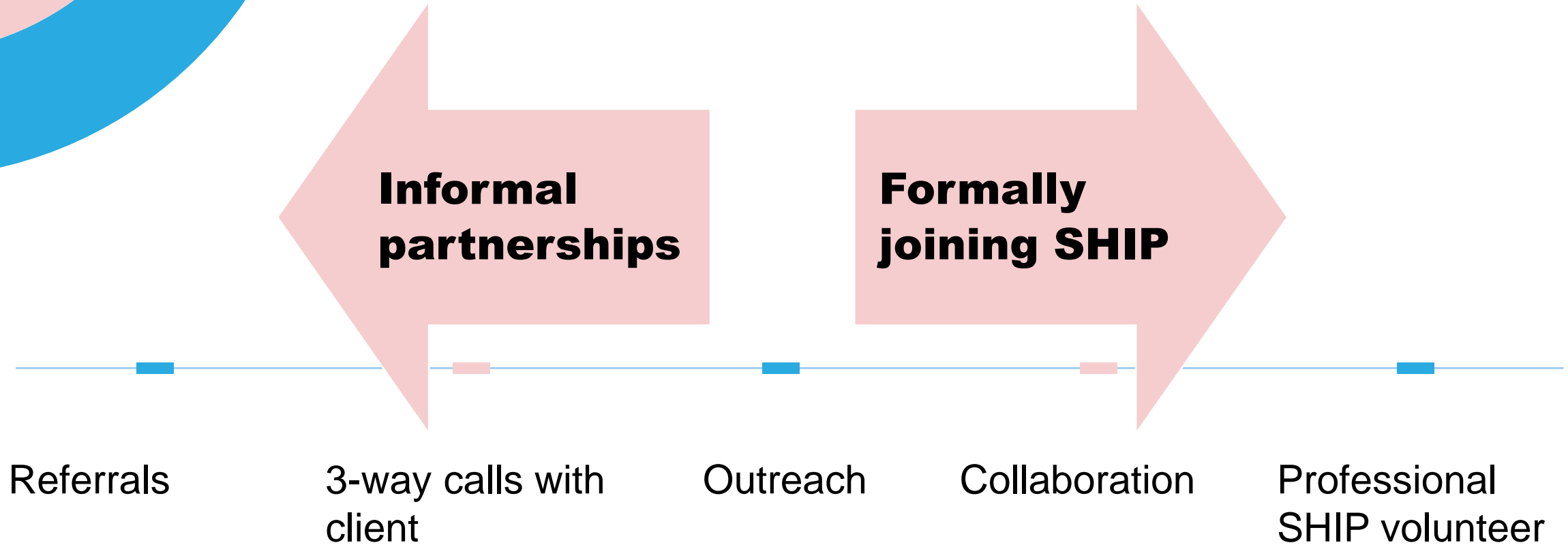
Considerations for maximizing efficacy of partnerships

Poll

Do you have relationships (formal or informal) with any of the following partners?

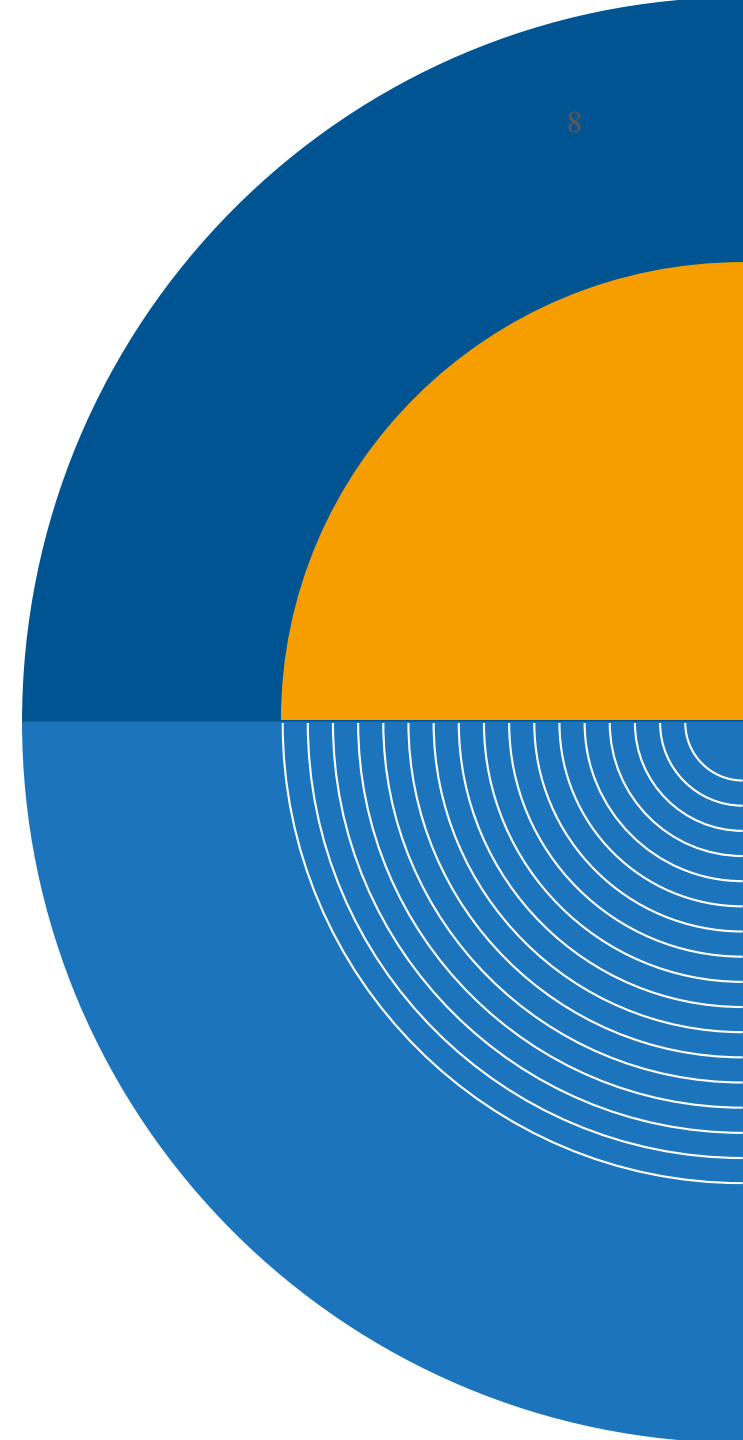
- Clinics
- Senior housing
- Senior centers
- Local jails or prisons
- Community centers
- Other (write in chat)

Partnership Spectrum



The goal is to find the right kind of partnership, balancing efficacy and efficiency.

Identify the best fit for the situation.



Considerations

Benefits

- CEU opportunities
- Comprehensive, online Medicare training
- Access to the SHIP Technical Assistance Center
- Access to SHIP-exclusive resources, including the Complaint Tracking Module and CMS helpline

Requirements

- Complete reporting requirements
- Comply with confidentiality rules
- Pass conflict of interest screening
- Sign up as volunteer under a WI SHIP organization

Advice from Other States

Potential partnerships and mutual referral sources:

- Community health centers and workers
- Employers
- Federally qualified health clinics
- Mental health professionals
- Pharmacy schools
- Senior centers
- Social work schools
- Townships
- Veteran service officers



Discuss

Share your experiences, ask questions, or
discuss ideas!

Boundaries

Confidentiality and conflict of interest policy

Confidentiality Policy

Professional SHIP volunteers must abide by the SHIP confidentiality policy.

The [SHIP volunteer agreement template](#) on the [GWAAR SHIP Volunteer Resources webpage](#) summarizes state confidentiality policy.

Conflict of Interest

The Administration for Community Living (ACL) created a [Managing Conflicts of Interest in SHIP, MIPPA, and SMP Programs guide](#) that identifies potential conflicts of interest and suggests mitigation techniques.

Generally, **as many plans as possible** must be represented at events or in agency materials to avoid any appearance of favoritism or bias.

Agents and Brokers

Prohibited

- SHIP is sole source of training to agents/brokers
- SHIP event/info with one or few available plans or agents listed
- SHIP refers clients to one or few agents/brokers

Allowable

- ➔ • Refer to [Covering WI, National Training Program, Fall Medicare Trainings](#)
- ➔ • SHIP event/info with most or all available plans or agents listed
- ➔ • SHIP provides info on agent/broker role to clients and on SHIP role to agents/brokers



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Referrals and Resources

To share with prospective professional volunteers

How to Refer Prospective Volunteers

You and/or the prospective volunteer can email the Wisconsin SHIP Director, Michelle Grochocinski, at michelle.grochocinski@dhs.wisconsin.gov to talk about whether formally joining the SHIP network would be a good fit.

The state volunteer program coordinator, Sam Margelofsky (samantha.margelofsky@dhs.wisconsin.gov), is also available to assist.

Resources

- [\(Customizable\) SHIP Professional Volunteer Brochures \(P-03499\)](#)
- [DHS SHIP Volunteer webpage](#)
- [GWAAR SHIP Volunteer Resources webpage and templates](#)
- [Volunteer Risk and Program Management Policy Standards \(VRPM\) \(P-02236\)](#)
- [CMS National Training Program](#)

Email Template

If you are interested in joining the SHIP network as a volunteer, I'd be delighted to talk with you. Benefits of joining the network include:

- **Access to the national SHIP Technical Assistance Center**, which offers:
 - resources (flyers, brochures, guidance documents, articles, etc.)
 - webinars
 - trainings
 - Medigap comparison tool
- **Comprehensive online Medicare training curriculum**
- **Live (currently virtual) trainings**, including outreach and assistance tips and best practices
- **Networking opportunities** with other SHIP counselors and strengthened relationships with partner organizations
- **The Complaint Tracking Module**, an online portal to which select SHIP supervisors can request that Medicare Part C and D plans resolve an issue.

Serving as a SHIP volunteer and program representative includes some responsibilities that you should consider:

- **Conflict of interest:** It is imperative that SHIP representatives do not have any conflicts of interest or perceived conflicts of interest that would impede their ability to provide unbiased information and assistance. All potential SHIP volunteers are screened for conflicts of interest and subject to a national criminal background check.
- **Reporting:** We ask SHIP team members to report their Medicare-related individual counseling sessions and outreach activities into the SHIP Tracking and Reporting System (STARS) website. Entering data is likely the biggest time barrier for prospective in-kind volunteers. The site is pretty intuitive, though, and I could show you what it's like if that would be helpful.
- **Confidentiality:** SHIP counselors must honor client privacy and confidentiality rules.
- **Support:** A local agency or state Medicare helpline would need to attest that they are available to answer your SHIP-related questions and offer support when needed.



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Conclusion

Request CEUs

Complete the Zoom survey following this training to request a CEH/CEU certificate.

You must attend live training to be eligible for CEHs/CEUs. Your attendance will be verified using Zoom attendance reports.

The CEH/CEU is being provided through University of Wisconsin-Stevens Point, an accredited university. The continuing education certificate may cover several professions from social workers, counselors, educators, etc. The training attendee can submit the CEH certificate to their area of practice for approval.

Please send CEH/CEU questions to, Pamela Watson, MIPPA grant program coordinator, at pamela.watson@dhs.wisconsin.gov.

Thank you!

Recording: [Vimeo](#)

Materials: [GWAAR SHIP](#)

[Volunteer Resources webpage](#)

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