



Vermont
Association of
Area Agencies
on Aging



*Vermont
State Health Insurance Assistance Program (SHIP)*

Certification and Recertification Guidelines

INTRODUCTION

The Administration for Community Living (ACL) mandated in its funding announcement for the 2017-2020 project period that SHIP programs include in their program proposals the details of how they will ensure that counselors providing SHIP services (paid, in-kind, and volunteer) are certified. (I & A staff are an example of in-kind SHIP staff when they do SHIP counseling.)

SHIP counseling is defined as providing detailed, specialized, and individualized information to Medicare beneficiaries about eligibility and enrollment, benefits and coverage, appeal rights, and programs that help pay Medicare costs. The broad range of tasks that SHIP counselors perform includes:

- Assisting with Medicare enrollment
- Explaining Medicare enrollment options for beneficiaries who are still working
- Assisting with the transition to Medicare and other programs from coverage through Vermont Health Connect
- Explaining options for Medicare coverage, including Medicare Advantage plans and original Medicare
- Explaining and assisting with Special Enrollment Periods
- Assisting with Part D plan selection, enrollment and disenrollment
- Information and assistance with Equitable Relief
- Explaining Medicare Supplemental plan coverage and enrollment periods
- Filing complaints on the Complaint Tracking Module (CTM)
- Assisting with complex Medicare coverage and enrollment issues
- Assisting with applications and enrollment in Medicare Savings Programs, VPharm, Low Income Subsidy
- Providing information and assistance with Medicare appeals and appeals for the programs that help pay Medicare costs

In addition to counseling, there are other levels of SHIP work that staff and volunteers perform, for example:

- Assisting with tasks related to Open Enrollment, such as running medication lists for beneficiaries, explaining options from the Plan Finder, etc., but not performing any other SHIP counseling tasks
- I & A and other AAA staff who perform limited SHIP-related work but do not do the full range of counseling
- Staff and volunteers do only data entry for SHIP and do not perform any counseling tasks

Only staff and volunteers who generally perform the broad range of counseling activities listed above need to be certified. Certification and training requirements are detailed below.

	Certification Required	Certification Not Required
Staff and volunteers <u>providing a broad range of SHIP counseling services</u> to individual beneficiaries, including counseling about Medicare and other insurance programs, and outreach that involves substantive training about Medicare and other programs.	√	
Staff and volunteers who perform administrative tasks such as data entry, filing, and staffing an exhibit and <u>who do not perform any counseling services on Medicare or other insurance</u>		√
Staff who assist with Open Enrollment, including running drug lists and explaining PDP options. They need to be trained in Medicare basics and the Plan Finder on Medicare.gov.		√
I & A and other AAA staff who do limited SHIP work but not a broad range of SHIP counseling		√

WHO NEEDS TO BE CERTIFIED?

- All SHIP counselors, coordinators, AAA staff including I & A, and volunteers hired April 1, 2018 or later who are providing a broad range of SHIP counseling services to individual beneficiaries, including counseling about Medicare and other insurance programs, must be certified within 6 months of hire and prior to providing SHIP counseling services.
- All SHIP counselors, coordinators, AAA and I & A staff, and volunteers hired prior to April 1, 2018 who do a broad range of SHIP counseling, must pass the SHIP certification exam designated by the SHIP Director on the SHIP TA Center website by August 1, 2018, unless they were previously certified by the Center for Medicare and Medicaid Services (CMS) or other certification means.
- AAA staff with a CMS Unique ID are considered to be doing SHIP counseling work and will need to be certified. Staff requesting a CMS Unique ID after April 1, 2018 need to be certified prior to obtaining the Unique ID.

SHIP Certification Requirements for SHIP Counselors Hired Prior to April 1, 2018

SHIP and AAA staff doing SHIP counseling hired prior to April 1, 2018, can become certified by passing the certification exam on the TA Center web site designated by the SHIP director and do not need to complete the core Curriculum courses.

SHIP Certification Requirements for SHIP Counselors Hired April 1, 2018 or Later:

- Completion of all levels and courses in the Core Curriculum* in the Medicare Rights University on the SHIP TA Center website <http://shipta.medicareinteractive.org>
- Completion of the “test your knowledge” exam questions upon finishing each course
- Pass the certification exam on the SHIP TA Center web site designated by the SHIP director on completion of all the core curriculum courses. The exam can be taken from any location.
- SHIP and AAA staff doing SHIP counseling hired prior to April 1, 2018, can become certified by passing the certification exam on the TA Center web site designated by the SHIP director and do not need to complete the core Curriculum courses.

Certification Exams

The SHIP Director will designate the appropriate exam for staff who need to be certified, and will email documentation of certification upon notification on the TA Center web site of successful passing the exam.

Answering correctly 35 of the 50 questions on the test is required to pass the exam. Anyone taking the certification exam will have 3 opportunities to pass it. If it is not passed in 3 attempts, a new exam will be developed for further attempts.

WHO DOES NOT NEED TO BE CERTIFIED

Staff and Volunteers who only assist during Open Enrollment

Staff and volunteers who only work to assist the SHIP Coordinator during Open Enrollment do not need to be certified. They need to have adequate training annually about Part D and the Plan Finder before each Open Enrollment and work under the direction of the SHIP Coordinator or other designated trained supervisor.

I & A and Other AAA Staff Who Perform Limited SHIP-Related work

I & A and other AAA staff who do not perform a broad range of SHIP counseling tasks but who perform limited counseling tasks such as answering basic Medicare questions, sending out information and applications, and making referrals do not need to be certified. They need to work under the direction of the SHIP Coordinator or other designated trained supervisor to ensure adequate training and support so that correct information is provided to beneficiaries.

RECERTIFICATION AND ONGOING TRAINING REQUIREMENTS

Ongoing training for staff and volunteers doing SHIP work is essential to keep up-to-date on changes, new procedures and policies, etc. to Medicare and other programs related to Medicare. Training opportunities are generally self-selected and can include any SHIP and MIPPA related webinars, trainings, and courses offered in person or online by Medicare, Aging, and Disability experts including: CMS, National Council on Aging, Justice in Aging, Medicare Rights Center, Center for Medicare Advocacy, Administration for Community Living, Social Security Administration, Vermont Association of Area Agencies on Aging (V4A), National Association of Area Agencies on Aging (N4A), SHIP TA Center. Many webinars are recorded and can be listened to and viewed after the initial presentation.

V4A training information is found here <http://www.vermont4a.org/>

Certified SHIP Counselors:

Once SHIP Counselors are certified, 12 hours of ongoing training each grant year is needed to retain certification. The SHIP/MIPPA Quarterly report form is used to list trainings attended.

Staff and Volunteers who only assist with Open Enrollment:

Staff and volunteers who assist only with Open Enrollment and do not need to be certified need to be adequately trained annually in Part D, the Medicare Plan Finder, entering drug lists, etc. Training can be provided by the SHIP Coordinator, through the SHIP TA Center online courses, or other similar methods.

I & A and other staff who perform limited counseling tasks:

I & A and other staff who perform limited counseling tasks and who do not need to be certified should have at least 4 hours of training throughout the calendar year. Training can be provided by the SHIP Coordinator, through reading Medicare update information from the SHIP Director, or through any of the other training opportunities outlined below.

Medicare Rights Center Training Curriculum on SHIP TA Center Website

<http://shipta.medicareinteractive.org>

***Core Curriculum:**

Level 1: Medicare Basics (4 courses)

Level 2: Coverage Rules (5 courses)

Level 3: Appeals and penalties (4 courses)

Level 4: Other Insurance and Assistance programs (4 courses)

Special Topics:

Medicare Coverage of Durable Medical Equipment

Medicare and End Stage Renal Disease

Medicare and Hospital Discharge planning

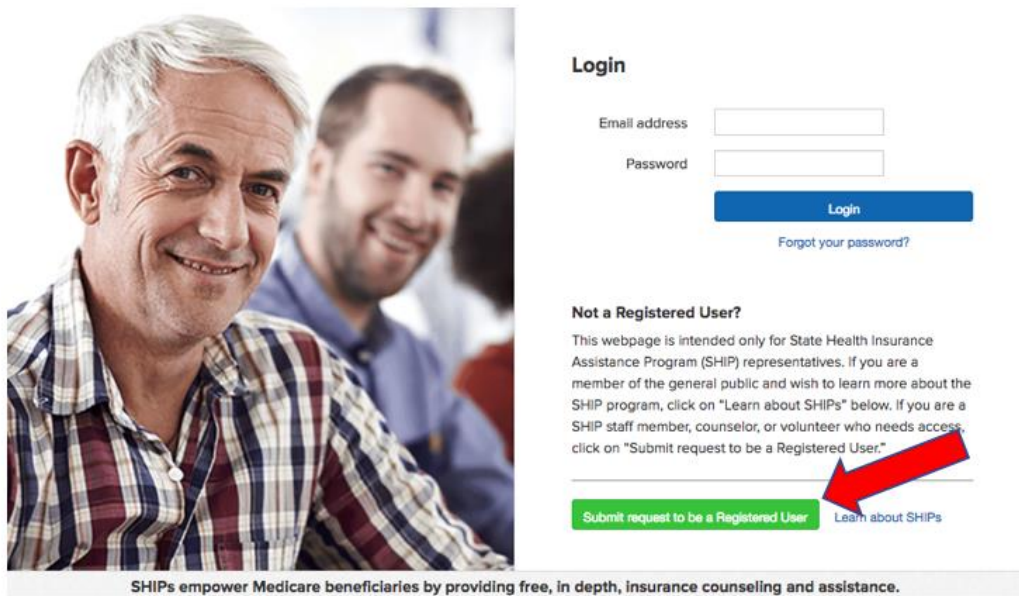
Each course includes: Course materials, Supplemental Materials, Glossary. The Course Materials include a “test your knowledge” exam of 5 questions at the end of the course).

Levels 1-4 (all courses) take approximately 8-9 hours to complete. Each course is approximately 30 minutes long. Courses can be stopped and started again. They can be viewed on any internet browser from any location.

How to Register with and Log into the SHIP TA Center Website

Go To: <https://www.shiptacenter.org/>

To register with the SHIP TA Center, click on the green button to “Submit request to be a



Login

Email address

Password

Login

[Forgot your password?](#)

Not a Registered User?

This webpage is intended only for State Health Insurance Assistance Program (SHIP) representatives. If you are a member of the general public and wish to learn more about the SHIP program, click on "Learn about SHIPs" below. If you are a SHIP staff member, counselor, or volunteer who needs access, click on "Submit request to be a Registered User."

[Submit request to be a Registered User](#) [Learn about SHIPs](#)

SHIPs empower Medicare beneficiaries by providing free, in depth, insurance counseling and assistance.

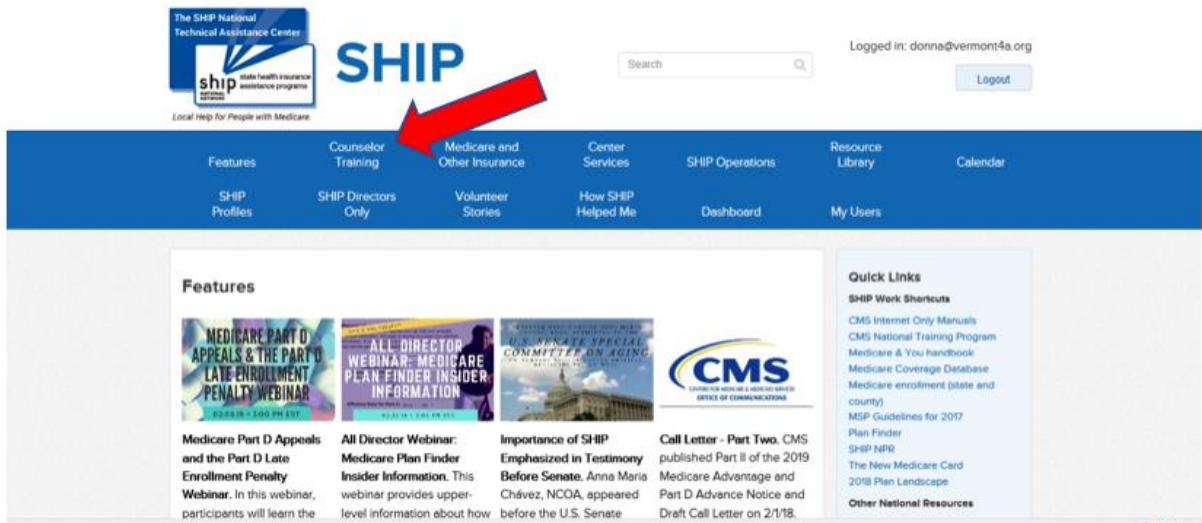
Registered User”



If you are already a registered user, log-in with your email address and password.

Accessing the Counselor Training and Certification Section of the SHIP TA Center Website

1. Click on the “counselor training” section using the link on the top left of the blue bar



2. Click-on “Counselor Training and Certification” button



3. Click-on “About” for information, or, simply click-on “Courses” (see the next slide for options)

Online Counselor Certification and Training

Welcome to the national SHIP Center's online Medicare courses and online certification tool for SHIPs

[ABOUT](#)

- Click the Level, then the Course to start the course. The courses can be paused and returned to later.

is followed by Special Topics, which address subjects not covered in the core curriculum.

Level 1: Medicare Basics

This level serves as a gateway to understanding Medicare. Throughout the Level 1 courses, you will learn common insurance and health care terms, gain an understanding of Medicare eligibility requirements, and receive a broad overview of the fundamental components of Medicare.

Level 1: Medicare Basics

+ Course 1: Health Insurance Terms	▶ Start Course
+ Course 2: Medicare Overview	▶ Start Course
+ Course 3: Medicare Options	▶ Start Course
+ Course 4: Enrollment Periods	▶ Start Course



Course 1: Health Insurance Terms

This course reviews commonly used insurance terms, so that you can begin to understand the language of health insurance and Medicare. In this course, you will learn helpful health insurance vocabulary that is important to know when discussing Medicare with colleagues and clients.

Level 1: Medicare Basics

- Course 1: Health Insurance Terms
- Course 2: Medicare Overview
- Course 3: Medicare Options
- Course 4: Medicare Enrollment Periods

EXPAND VIDEO



5. Once the course is completed, complete the “test your knowledge



Test Your Knowledge

- [Course Materials](#)
- [Supplementary Materials](#)
- [Glossary](#)

Was this helpful?

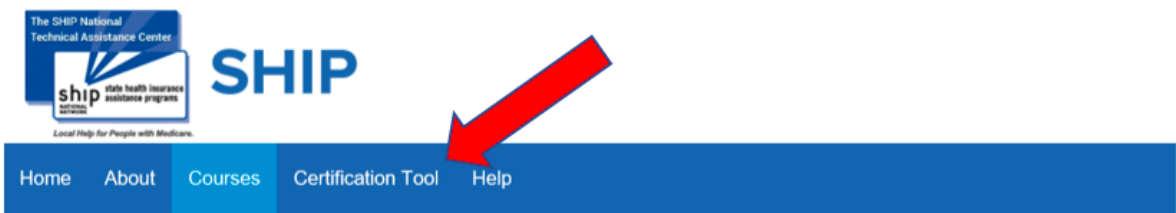
Yes No

[Previous Page](#)

[Next Page](#)

6. Complete each Level and all of the courses in the Core Curriculum, and the “test your knowledge at the end of each course.

7. Once all the Levels and courses and tests are complete, click on the “Certification Tool”.



[Home](#) > [Courses](#)



[Home](#) > SHIP Certification Tool

SHIP Certification Tool



Exam List	Participant List	Result List		
Exam Name	Take Exam	Schedule Participants	View Results	
Vermont SHIP Certification Exam	Take Exam	Schedule	Results	
Sample Exam - 25 questions	Take Exam	Schedule	Results	
Sample Exam - 50 questions	Take Exam	Schedule	Results	
Sample Initial Certification Exam - 75 questions	Take Exam	Schedule	Results	

8. Contact the SHIP Director to schedule the certification exam.

9. Contact the SHIP Director once the exam is completed for the results. Documentation of certification will be emailed from the SHIP Director if the exam is passed. If it was not passed, the exam can be taken 2 additional times. If it is not passed after three tries, a new certification exam will be designated.

