

Onboarding a New Volunteer to SHIBA

1. Receive communication from interested party
 - a. The state office responds to all Volunteer Match inquiries with a reply to the interested volunteer, cc-ing the appropriate sponsor
 - b. The sponsor recruits a potential volunteer directly
2. Interested party must submit a formal application
 - a. The easiest way to do this is on the SHIBA website:
healthcare.oregon.gov/shiba/volunteers/Pages/Volunteer-application.aspx
 - b. Paper applications are acceptable as well and should be FAXed (503-947-7092), mailed to the state office, attn.: Dawn Shaw (PO Box 14480, Salem, OR 97309), or emailed (Dawn.Shaw@oregon.gov)
3. Coordinator interviews applicant to determine fitness for volunteer service. This formal interview determines if
 - a. The applicant understands the commitment requirements
 - i. Provide copy of *Volunteer Policies and Volunteer Job Description*
 - b. The applicant understands the training requirements
 - c. The applicant has a aptitude for the subject
 - d. The applicant has the temperament for the job / group
 - e. The applicant is not an actively licensed health insurance agent or financial planner
 - f. The applicant wants to continue!
4. Coordinator should take the following actions once applicant has been accepted as a volunteer-in-training:
 - a. Notify Dawn Shaw at the state office to add applicant to the roster as a counselor-in-training
 - b. Provide the following documents to be signed by the volunteer
 - i. *Confidentiality & liability statement* (keep in your volunteer records file)
 - ii. *Conditions of volunteer service* (**mail original** to state office)
 - c. Provide the volunteer with the process for completing their training. This process could be provided in a volunteer handbook if available.
 - i. *New volunteer checklist*
 - ii. *SHIBA Online Training Process* (and test registration)
 - d. Instruct the volunteer on how to register at SHIPTACenter.org (instructions included in *SHIBA Online Training Process* document)
 - e. Provide the volunteer with the online URL for or printed copies of Core Modules healthcare.oregon.gov/shiba/volunteers/training/Pages/modules.aspx
 - f. Provide the volunteer with the SHIBA meeting schedule
 - g. Assign a certified counselor as mentor to the new volunteer during the training process (best practice)
5. Coordinator notifies Dawn Shaw when the volunteer is ready to test on the Core Modules. A score of 80% or better is required to pass. Volunteer must be registered with the SHIP TA Center website.
6. Volunteer will, when available, attend a 2-day New Volunteer Training. In some circumstances, hybrid training via recorded webinar may be an option. This is determined by the Field Officer.

7. Coordinator will schedule new counselor to participate in an internship with a certified counselor(s) for a minimum of 10 hours or until they feel comfortable counseling alone.
8. Coordinator will contact Dawn Shaw when the volunteer is close to completing the training to
 - a. Request a Criminal Background Check (CBC) and fingerprinting packet
 - b. Provide the volunteer with the CBC packet which includes
 - i. *Volunteer Steps for CBC and Fingerprinting*
 - ii. *Criminal Background Request form* to be completed by counselor and returned to Coordinator
 - iii. *Conditions of Volunteer Service* (may have already been signed/returned to state office)
 - iv. *New Team Member form* to be completed by counselor and returned to Coordinator for creation of STARS account (fax to state office)
 - v. *Confidentiality for Receipt of Unique ID Number* to be signed completed by counselor (fax to state office)
 - c. Provide a copy of or email to the new counselor the following
 - i. *Unique ID FAQ*
 - ii. *Medicare SHIP Hotline Directions for Use*
 - iii. *CMS SHIP Unique ID Counselor Job Aid*
9. Coordinator will mail to Dawn Shaw in the self-addressed envelope the completed, sealed and initialed *CBC Request form*,.
 - a. Once received by the state office, this initiates generating an email to the new volunteer to go for fingerprinting.
10. Coordinator will FAX, securely email or U.S. mail the *New Team Member form* to the state office
 - a. Coordinator will provide new counselor with *My STARS Account Job Aid*
11. Dawn Shaw will create new profile in STARS upon receipt of the *New Team Member form*, notifying the sponsor and field officer when completed
 - a. This will generate log-in credentials to be sent to the new volunteer from Booz Allen Hamilton (BAH)
12. Coordinator will schedule a meeting with new counselor (or between mentor / mentee) to review internship, data entry into STARS, any outstanding paperwork / requirements, review checklist, etc.
13. Dawn Shaw will notify Coordinator of CBC results
14. Coordinator will notify Dawn Shaw when the new volunteer has completed their internship.
15. If all other requirements have been completed, the volunteer is now certified to counsel on their own.