

# Check List for Annual Counselor Review SHIBA and SMP Training/Recertification

Date of Contact: \_\_\_\_\_

Contacted by: \_\_\_\_\_

## Volunteer Information

Name: \_\_\_\_\_

E-mail: \_\_\_\_\_

Counseling Location (office/county) \_\_\_\_\_

Phone: (H) \_\_\_\_\_ (O) \_\_\_\_\_ (Cell) \_\_\_\_\_

Coordinator(s): \_\_\_\_\_

Mentor(s): \_\_\_\_\_ ; \_\_\_\_\_

Date of initial certification: \_\_\_\_\_

Information update at State Office (e-mail, address, etc.) Y/N

## Orientation

\_\_\_\_\_ Mission, goals, service philosophy

\_\_\_\_\_ Calendar of regular volunteer meetings & events

## The Position

\_\_\_\_\_ Position description/job responsibilities (SHIBA and SMP)

\_\_\_\_\_ Best Practices

\_\_\_\_\_ Organizational chart /Contacts and Roles of SHIBA and DHS staff  
relative to volunteer's position

## Recording/Reporting

\_\_\_\_\_ Security/Preservation/Destruction of Records

\_\_\_\_\_ STARS forms refer to STARS Job Aids for correct data field to mark for  
MIPPA &SMP

\_\_\_\_\_ STARS recording [smpship.acl.gov/](http://smpship.acl.gov/)

\_\_\_\_\_ Phone calls and appointments

**Computer Use/Resources**

- \_\_\_\_\_ Medicare: [medicare.gov](http://medicare.gov) (Plan Finder, Medicare What’s Covered, Authorized Representative Form, Appeal Process, [MyMedicare.gov](http://MyMedicare.gov), etc.)
- \_\_\_\_\_ Social Security: phone #, website, [SSA.gov/MySocialSecurity](http://SSA.gov/MySocialSecurity)
- \_\_\_\_\_ Extra Help (LIS) application [benefitscheckup.org/Oregon](http://benefitscheckup.org/Oregon)
- \_\_\_\_\_ Referrals to DHS for OR State Medicaid benefits
- \_\_\_\_\_ Accessing Prescription Assistance Programs (PAP’s) [needymeds.org](http://needymeds.org) or [RxAssist.org](http://RxAssist.org)
- \_\_\_\_\_ OR PDP [oregon.gov/OHA/pharmacy/OPDP/](http://oregon.gov/OHA/pharmacy/OPDP/)
- \_\_\_\_\_ Division of Financial Regulation [dfr.oregon.gov](http://dfr.oregon.gov)
- \_\_\_\_\_ Oregon Health Insurance Marketplace [healthcare.oregon.gov](http://healthcare.oregon.gov)
- \_\_\_\_\_ SMP Resources [smpresource.org](http://smpresource.org)
- \_\_\_\_\_ VA [va.gov/healthbenefits/](http://va.gov/healthbenefits/)
- \_\_\_\_\_ DHS (Medicaid, OHP, etc.) [oregon.gov/dhs/](http://oregon.gov/dhs/)
- \_\_\_\_\_ STARS <https://smpship.acl.gov>

**Training/Outreach**

- \_\_\_\_\_ SHIBA Recertification
- \_\_\_\_\_ How to conduct SHIBA public outreach (group and media education and outreach)
- \_\_\_\_\_ How to track and enter STARS “Other activities, including volunteer’s training”
- \_\_\_\_\_ SHIBA training, webinars, [shiba.oregon.gov](http://shiba.oregon.gov) (contact your Coordinator)
- \_\_\_\_\_ SMP Training Status [smpresource.org](http://smpresource.org)
  1. Foundations \_\_\_\_\_
  2. Group Education \_\_\_\_\_
  3. Counselor Training \_\_\_\_\_
  4. Complex Issues \_\_\_\_\_

**Other (Your ideas for improvements):**

---



---



---



---



---



---



---



---