

SHIBA Volunteer Counselor Handbook



The Senior Health Insurance Benefits Assistance (SHIBA) program is pleased to have you as a volunteer counselor! The pages ahead contain important information about this program, your training, service, and rights.

If you have any questions about what you read, please contact Lisa D. Emerson, SHIBA Program Manager, lisa.emerson@oregon.gov (503) 947-7087.

Adapted from Northwest Senior and Disability Services

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SHIBA VOLUNTEER COUNSELOR POLICIES

The Senior Health Insurance Benefits Assistance program (SHIBA) will provide information and assistance to Medicare beneficiaries through a statewide network of certified counselors. Volunteer counselors will be trained in Medicare Parts A and B, Medicare supplemental insurance (Medigap), Medicare Advantage, Medicare Part D, Medicare Fraud & Abuse; educate about long-term care insurance, and other related issues. Volunteer counselors will work under the supervision of a Volunteer Coordinator, who is appointed by SHIBA's local sponsoring organization.

Services

SHIBA counselors shall provide:

- Accurate and objective health insurance information and counseling services to the client according to SHIBA guidelines.
- Individual assistance at specified sites, by telephone or in the client's home.
- Compare available health and/or drug plans using the Medicare Plan Finder tool on www.Medicare.gov
- Assessment of clients' resources and needs related to health care, health insurance, and financial assistance programs.
- Client referral to appropriate resources as needed.

Volunteer Commitment

SHIBA volunteers must:

- Successfully complete SHIBA Volunteer Application, screening process, volunteer training and required internship.
- Sign a SHIBA Confidentiality and Conflict of Interest Statement.
- Complete Client Contact form via the internet (SHIP NPR website) or paper for every client contact.
- Attend SHIBA volunteer meetings.
- Agree to a minimum number of service hours (subject to demand for service).
- Adopt the SHIBA program name and logo.
- Represent SHIBA and its network in a respectful and positive manner.

- Communicate in a courteous, positive, nonjudgmental manner with other counselors, clients, coordinators, and state staff. Views may differ but we do expect discussion to be professional and respectful.
- Media is referred SHIBA Field Officer. Field Officer will work with local Coordinator and state Communications resources.

Ethics and Conflict of Interest

According to the Federal Volunteer Protection Act, SHIBA counselors are protected from civil liability for injuries or damage to the person or property of others, subject to the following general conditions:

- The counselor is working on a state agency task assigned by an authorized agency supervisor.
- The counselor limits her/his actions to the duties assigned.
- The counselor adheres to the duties outlined in the Volunteer Counselor Job Description and these counselor policies.
- The counselor performs assigned tasks in good faith, and does not act recklessly or with the intent to inflict harm to others.

Position Description

SHIBA counselors provide confidential and objective health insurance counseling to people with Medicare in person and by phone. Counselors:

- Provide individual health insurance information, counseling, and assistance according to SHIBA guidelines and national State Health Insurance Assistance Program (SHIP) standards
- Maintain confidentiality of client information
- Assess clients' resources and needs related to health care and health insurance
- Refer clients to appropriate resources as needed
- Complete SHIBA reporting forms

Qualifications

SHIBA counselors are to have:

- A caring, helpful, and respectful attitude
- Interpersonal communication skills
- Oral and written communication skills
- Computer proficiency in email and Internet (or be willing to learn)
- Organization skills
- Reliable transportation
- No conflict of interest

Training

The SHIBA counselor training program is designed to prepare people to best serve the Medicare public. It includes:

- A SHIBA volunteer application process with a criminal background check
- Online training modules
- A face-to-face new counselor training
- At least 10 hours of internship with a certified SHIBA counselor

Training modules are located here:

http://www.oregon.gov/DCBS/SHIBA/Pages/volunteer.aspx#SHIBA_Volunteer_Training_Program

Expectations

SHIBA counselors are to:

- Follow SHIBA reporting guidelines and timeframes
- Keep client information confidential
- Consult with their SHIBA Coordinator
- Attend SHIBA counselor meetings
- Participate in continuing education
- Complete annual recertification

Gifts and Payment

SHIBA counselors may not directly or indirectly ask for, give, receive, or agree to receive any compensation, gift, reward, or tip from clients.

Mileage Reimbursement

SHIBA counselors who do not deduct mileage costs on their taxes may request mileage reimbursement for travel to counseling appointments and SHIBA training meetings. To obtain a mileage reimbursement request form, please contact your local SHIBA Coordinator.

Emergency Client Situations

If a client discloses any abuse, neglect, self-neglect, or financial exploitation, it should be reported. A report may be by calling the statewide Elder Abuse Hotline at 1-800-232-3020.

Suicide Threats

If a client expresses or implies a suicide threat, be yourself, stay calm, and ask the client some questions. For example:

- Have you ever thought about hurting yourself?
- You mentioned hurting yourself. Is this something you have given a lot of thought to?

A client may respond that the statement or reference was made just out of frustration with his or her situation. If this is the case, be empathetic to the client's situation, yet also give the client the National Suicide Prevention Lifeline telephone number, 1-800-273-8255.

If the client expresses the threat is serious, **call 911**.

In either case, notify your local SHIBA Coordinator.

Harassment

The SHIBA program does not tolerate any form of harassment or discrimination. Such behavior is illegal under Title VII of the Civil Rights Act and inconsistent with SHIBA's mission and values. If you believe you have been subjected to harassment, please bring it to the immediate attention of your local SHIBA Coordinator, State SHIBA Field Officer or the State SHIBA Program Manager.

Accident Insurance Policy

Most local SHIBA program sponsors provide a Blanket Accident Insurance Policy to provide you with needed coverage in the event of an accident or injury while volunteering. A certificate of coverage is to be provided to you outlining the conditions of coverage. If you do not have one, please notify your SHIBA coordinator.

The state also has a volunteer injury coverage policy that may apply. The state SHIBA program follows its agency's, DCBS, policy. DCBS has adopted the Department of Administrative Services (DAS) Policy 125-7-204 Volunteer Injury Coverages, which describes how coverage applies during volunteer activities. All volunteer accidents and injuries need to be reported to your local SHIBA coordinator right away. Should you have any questions about the coverage your SHIBA coordinator is unable to answer, please call Lisa Emerson, statewide SHIBA Program Manager at 503-947-7087.

To be eligible, you must have completed a SHIBA volunteer application and been accepted as a SHIBA counselor. You must also volunteer directly with your local SHIBA program at least once every six months for a minimum of two hours during those six months and be participating in an activity related to your counselor duties.

Points of Contact

SHIBA

SHIBA Oregon

1-800-722-4134

Fax: 503-947-7092

<http://www.oregon.gov/DCBS/SHIBA>

Local SHIBA Coordinator

Name

Phone

Email

Oregon SHIBA Program Manager

Lisa Emerson

(503) 947-7087

Lisa.Emerson@oregon.gov

SHIBA Field Officers

Donna Delikat

503-947-7089

Donna.Delikat@state.or.us

Miranda Mathae

503-947-7088

Miranda.Mathae@oregon.gov

Pharmaceutical Assistance Programs_(PSP) - Prescription Drug Assistance

www.needymeds.org

www.rxassist.org

MEDICARE/Social Security

Medicare

1-800-633-4227 (open 24/7)

www.medicare.gov

Social Security

www.ssa.gov

Salem Office
STE 110
1750 MCGILCHRIST ST SE
SALEM, OR 97302

Phone: 1-800-772-1213

TTY: 1-800-325-0778

Hours: Monday 9:00 AM - 3:00 PM
Tuesday 9:00 AM - 3:00 PM
Wednesday 9:00 AM - 12:00 PM
Thursday 9:00 AM - 3:00 PM
Friday 9:00 AM - 3:00 PM
Saturday Closed
Sunday Closed

Washington, DC Office
1-800-722-1213 (closes 7:00 PM Pacific time)

Extra Help with Prescription Drugs (Social Security Low Income Subsidy - LIS)

<http://www.benefitscheckup.org/oregon>

Center for Medicare Services (CMS) (regulations, guidance, coverage, etc.)

www.cms.gov

Other Contacts

Veterans Administration

1-877-222-8387

www.va.gov

Local service center:

503-373-2000 or 1-800-838-8801

For benefits information: 1-800-692-9666

Department of Health Services (Oregon) (Medicare Savings Programs/Medicaid, food stamps, housing, etc.)

Marion, Polk and Yamhill counties: **(503) 304-3420**, or toll-free at **1-866-206-4799**.

Clatsop and Tillamook counties, call **(503) 815-2060**, or toll-free at **1-800-584-9712**. Email information.nwsds@nwsds.org.

<http://www.oregon.gov/dhs/>

OregonHealthcare.Gov
<http://healthcare.oregon.gov>

Oregon Health Insurance Marketplace

For information and questions about enrolling in private health insurance, go to HealthCare.gov or call the HealthCare.gov Service Center at 800-318-2596 (toll-free) (TTY: 855-889-4325). The HealthCare.gov Service Center operates 24 hours a day.

The Oregon Health Insurance Marketplace also offers general information for consumers through a local service center, which can be reached by calling 1-855-268-3767 (toll-free) between 8 a.m. and 5 p.m. Monday through Friday or emailing info.marketplace@oregon.gov except state government holidays. The local service center can help direct you to local information and resources and help with private health insurance purchased through Cover Oregon in 2014.

Oregon Department of Consumer and Business Services Division of Financial Regulation (Insurance complaints and identity theft protection)

1-888-877-4894
503-947-7984
<http://www.cbs.state.or.us/ins/consumer/consumer.html>

Senior Medicare Patrol – ADRC (Medicare waste, fraud and abuse)

1-855-673-2372
www.ADRCofofOregon.org
www.stopmedicarefraud.gov

Aging and Disability Resource Connection of Oregon (ADRC) www.adrcforegon.org

Oregon Prescription Drug Program (OPDP) <http://www.oregon.gov/OHA/pharmacy/OPDP>

Client Reporting

Required Reporting and Paperwork

There are three forms that you may be asked to complete, depending on your volunteer responsibilities:

Time Sheet

Time sheets help us better understand the contributions of volunteers statewide and help us analyze our current and future capacity for serving clients. Your local coordinator will have a time sheet that you should complete. They can give you directions on how to complete it and when to turn it in.

Client Contact Form

The Client Contact Form gathers information about each client we serve and their information needs. Client reports are to be completed for each contact where any discussion about Medicare or related items (as listed on the form) take place, either face-to face or by telephone. A client form is not necessary for a contact where only an appointment is made to meet with a SHIBA counselor. Form OMB No. 0938-0850 should be used.

Individual client data contact information and names are removed when the data is uploaded. The data we collect helps us better understand the demographics of those we serve and the issues they are facing.

Client Contact Form directions:

1. Client Identifiers: leave blank
2. Client Name and Contact Information: Complete a separate form for a spouse or other who is also counseled during the same face-to face meeting. Representative Name can be caregivers, family members or others assisting the client.

3. Please note the sections where “PMS %” is flagged. These sections provide extra weight (credit) to local SHIBA offices for counseling done in these areas and affect our federal grant amounts.
4. State and Local Special Use field at the bottom left/back side should be completed

You are encouraged to provide additional comments on the form or provide attachments to help provide a reference for future use, such as a client who returns later.

Client Reports are to be submitted to your SHIBA Coordinator no later than the 5th of the following month of the contact. Counselors may wish to input the client form data in SHIPNPR for the month, but also must forward hard copies of the client reports for the file. By using Shiptalk, counselors can access client information from past contacts at any time. (see SHIPtalk below)

Reminders:

Complete a Client Contact Form even for phone calls where information and help about Medicare is provided. A form is not required when just making an appointment.

Do not ask clients about their race or ethnicity. Mark the appropriate box solely by a visual identification.

If a client is uncomfortable about sharing any information, leave that section blank.

Public and Media Events Form (PAM)

The Public and Media Events Forms capture all of our outreach and community education efforts, whether they are public presentations, health fairs, enrollment events, or advertising. One form should be completed for each event, regardless of how many volunteers participate. In some cases a Public and Media Events Form and Client Contact Form might be completed (i.e., for an enrollment event that includes a Medicare workshop and individual counseling sessions. Like the Client Contact Form, this information is also uploaded to the national SHIP database. This data helps

us understand which communities we are reaching and who may still need help. It also helps us track which topic areas we are covering most often.

SHIPNPR

Counselors who wish to input their client reports online may do so at:

<https://shipnpr.acl.gov>

Contact your local SHIBA Coordinator to establish a password and for further guidance.

Use and Distribution of Approved Materials

For quality control purposes and statewide consistency, please feel free to print and distribute to the public materials provided by government agencies such as CMS, ACL, Social Security, SHIBA, and SMP. Printing information from Medicare supplemental insurance companies and other resources listed above can also be helpful. If you have a helpful handout that you have created yourself, please have this approved by your Coordinator before distributing it to clients. Care should be taken to produce and distribute publications that are accurate, helpful, easy to understand, and have a consistent look and feel. We encourage feedback on how we can improve these tools.

Special Accommodations

Many of our clients are persons with disabilities. We also encourage people with disabilities to join our community of volunteers. If you need special accommodations, don't hesitate to let your Coordinator know. We will take care to maintain your confidentiality to the greatest extent possible and will work to find accommodations that allow you to contribute.

These accommodations might include:

- Removing barriers and increasing accessibility
- Restructuring a volunteer job or role
- Modifying a service schedule
- Modifying policies or procedures
- Obtaining or modifying equipment or devices
- Providing services, such as qualified readers, interpreters, or adjusting or modifying training activities, materials, or examinations

Serving Limited English Speaking People and Diverse Communities

We make every effort to help people from all walks of life, regardless of whether their primary language is English. When you have difficulty communicating with clients with a different native language, take steps to ensure their comprehension.

Here are a few suggestions:

1. Give the client a detailed verbal explanation
2. Give them written materials in their own native language
3. Use a bi-lingual counselor from your team
4. Ask the client's family member or friend to help
5. Arrange for a qualified interpreter or phone interpreter service by contacting your Coordinator prior to the appointment.

Helping People with Mental Disabilities

In addition to challenges related to income, literacy, and language some of our clients struggle with mental illness or cognitive impairment that make it difficult to make appropriate choices on their own. Whether they are under stress, have a mental health condition, have a brain injury, disability, or other reasons they struggle to make a choice or simply default to the first option presented. And these decisions are not necessarily the most advantageous for them. Regardless of the reason for their indecision, steps should be taken to ensure that clients comprehend the important choices they are making about their health care and the potential impacts of their decisions on their future. And, if they are unable to make a competent choice, we need to reach out to family members and others for help.

The following are some things to remember when working with clients who struggle to understand:

- Continue to speak to them as an adult; do not use child-like language
- Present material in writing and draw diagrams if need be to convey a point
- When a client seems to have trouble understanding, make sure an appropriate family member or guardian assists the client with the decision making process
- Do not take action on a client's behalf unless you are sure they understand the consequences of their choice
- Refer the client to an appropriate social services agency if no support exists

SHIBA Staff Support for Volunteers

Local SHIBA Coordinator

The local SHIBA Coordinator directly supervises volunteers and can help you find the resources and support you need to perform their duties. If you are having difficulty on the job or cannot make it to your scheduled appointments, contact your local SHIBA coordinator immediately. Also, if you have any other questions or concerns about your service or the program, your local coordinator is the first person to ask.

Regional SHIBA Field Officers

Regional coordinators are responsible for delivering training and technical assistance to a specific geographic region. They are responsible for presenting in-person training and online webinars for volunteers. They also conduct annual update training for the continuing education of volunteers and facilitate focus groups, from time to time, to gather feedback and recommended program improvements directly from volunteers. They are also available by phone or email to answer technical questions you may have related to Medicare and other health insurance. We recommend you first review your training materials, and then consult with other counselors and their local coordinator before contacting your regional coordinator. You may find the answer is right around the corner. If you cannot find the answer through these routes, however, the regional coordinator is always happy to help.

Statewide SHIBA Program Manager

The statewide coordinator is directly responsible for the overall program administration statewide. If you cannot get resolution to a problem or issue at the local level, the statewide manager is available to lend an ear and help find a solution. The statewide manager is also always open to hearing suggestions about how to improve the SHIBA experience for volunteers.

Thank you for being a SHIBA Volunteer!



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