

Recommended Curriculum for Part D-Only State Health Insurance Assistance Program (SHIP) Counselors

This document outlines a suggested curriculum to train SHIP counselors who will only assist with Part D plan comparisons. The curriculum consists of online trainings and live webinars. This is a template; agencies can customize their training curriculum based on the counselor's familiarity with Medicare and local counseling practices. Contact the Wisconsin SHIP director, Michelle Grochocinski, at michelle.grochocinski@dhs.wisconsin.gov with questions.

Counselors who are trained to help with Part D only should refer clients who have questions about other parts of Medicare, have complex issues, or who may qualify for financial assistance programs to advanced-certified SHIP counselors, such as a [benefit specialist or Wisconsin Medicare helpline](#).

Time commitment

Online courses: 2 hours (depending on previous familiarity with Medicare)

Live webinars: 5 hours

Total time: 6 – 7 hours

SHIP policy

All SHIP counselors are bound by SHIP confidentiality policy. A [template for a volunteer confidentiality agreement](#) can be found on the [GWAAR SHIP Volunteer Resources webpage](#).

SHIP counselors who provide one-on-one Medicare counseling or outreach by themselves must pass the Basic SHIP Certification Exam on the [SHIP Technical Assistance \(TA\) Center website](#).

Online Courses

Wisconsin SHIP counselors who help exclusively with Part D plan comparisons should complete the below trainings.

These courses can be found in the [learning management system](#)'s SHIP Counselor Certification Course; courses labeled "OCCT" are links to the [SHIP TA Center](#).

SHIP Course: Getting Started

- SHIP Curriculum Description & Course Tips
- Supplemental Resource: SHIP TA Center OCCT User Guide

SHIP Reference Documents

- Supplemental Resource: SHIP Cheat Sheet Packet

SHIP Medicare Basics

- OCCT Course 1.2: Medicare Overview (30 min) *(if unfamiliar with Medicare)*
- OCCT Course 1.3: Medicare Options (30 min) *(if unfamiliar with Medicare)*
- OCCT Course 2.3: Part D (Medicare Prescription Drug Benefit) (40 min)
- Supplemental Resources: Plan Finder Demo and Creating a Medicare Account

SHIP Medicare Assistance Programs

- Presentation: SeniorCare (30 minutes)

Live Webinars

Wisconsin SHIP counselors who help exclusively with Part D plan comparisons should complete the below webinars from the Basic SHIP Counselor Training series, which are offered live every spring and fall.

Registration information for the webinars will be emailed to the SHIP listserv a month ahead of time.

- SHIP & MIPPA Counselor Orientation
(or view online recording in learning management system)
- Medicare Part D
- Medicare.gov Plan Finder

Recordings can be found on [Vimeo](#) (password: Medicare101).

Materials can be found on the [GWAAR Medicare Outreach and Assistance Resources webpage](#) under Basic SHIP Counselor Training.