



AO SHIP Counselor Checklist

Congratulations on becoming a SHIP counselor!
Use this list below to make sure you have done all the essentials as you get started.

BEFORE BECOMING CERTIFIED

- ☐ Fill out the [Volunteer Application Form](#).
- ☐ Give the Volunteer Application to your site coordinator (let them know which training you would like to attend).
- ☐ Attend the SHIP training you signed up for.
- ☐ Submit and pass the SHIP exam.

CERTIFIED SHIP COUNSELOR

- ☐ Get STARS Access
- ☐ Complete the [criminal background check](#) with your agencies preferred vendor.
- ☐ Give receipt of background check to your site coordinator.
- ☐ Meet with your site coordinator to go over the process and procedure at your agency.

WHAT TO KEEP AT WORK

- ☐ [Chart of Benefits](#)
- ☐ PDF or physical copy of the [SHIP manual](#) (updated every year on the SHIPHELP.org).

GET FAMILIAR WITH

- ☐ Shiphelp.org
- ☐ CMS national Training Program
- ☐ AgeOptions Avisery

- ☐ Dedicated Medicare SHIP line (888-647-6701)
- ☐ [HelpHub](#) – Online community for help with Medicaid cases and questions.
- ☐ IDOA SHIP representatives – they can help troubleshoot cases, look up client specific info., and STARS account issues.

DAILY ROUTINE

- ☐ Shadow other SHIP counselors.
- ☐ Practice! Try a few more simple calls.
- ☐ Take time to make yourself notes and tip sheets.