



SMP Volunteer Training Implementation Guide

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SMP Volunteer Training Implementation Guide

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Introduction

The SMP program has evolved since its inception from a handful of diverse demonstration projects in 1997, located in just a few states, to a nationwide credible and trusted community resource, available in every state, the District of Columbia, Puerto Rico, Guam, and the Virgin Islands. Concurrently, the nature of volunteering in America and the nature of health care fraud have also evolved.

With these changes in mind and to achieve the Administration on Aging's (AoA) objective of national program visibility and consistency, it is essential that the heart and soul of the program – SMP volunteers – be provided the skills, tools, and resources necessary to meet the needs of the communities and people they serve.

With this in mind, the Administration on Aging has funded the development of a comprehensive national SMP Volunteer Training Program, which is being made available to all SMP projects in stages over several years. The purpose is to provide consistent and accurate training to SMP volunteers across the country and to make it easier for SMPs to train volunteers.



National SMP Volunteer Training Program Goals

- Enhance the professionalism and overall level of expertise of the SMP volunteer workforce
- Enhance beneficiary confidence in and reliability of the information and assistance provided by SMP volunteers on health care fraud and abuse
- Enhance the credibility of the SMP program at the local, state, and national levels by developing recognized expertise in health care fraud prevention, identification, and reporting.

Introduction, continued

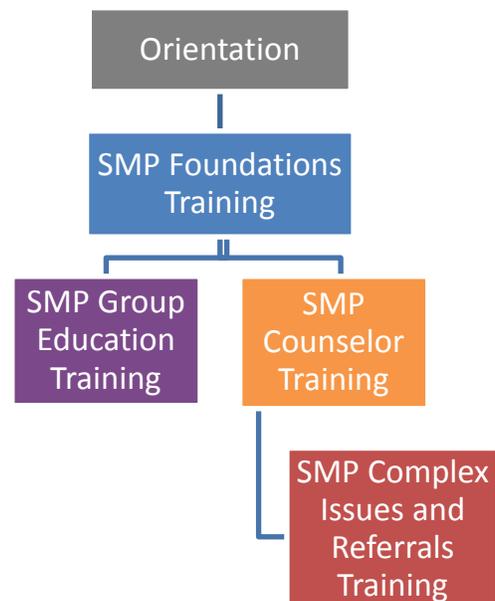
About this Guide

This guide is written for SMP directors, coordinators of volunteers, and others who have a role in training SMP volunteers.

Although the national SMP Volunteer Training Program can be an excellent tool for training SMP staff, the scope of this guide is to help SMPs succeed in implementing training for volunteers.

This guide contains information on the following topics:

- AoA's standards for SMP volunteer training
- An overview of the national SMP Volunteer Training Program, including a suggested outline for state-specific orientation and the four national SMP training courses:
 - SMP Foundations Training
 - SMP Group Education Training
 - SMP Counselor Training
 - SMP Complex Issues and Referrals Training
- A suggested step-by-step process for implementing these courses to volunteers



The SMP Volunteer Training Program (described on Pages 6 - 16) is designed according to the standard SMP volunteer roles (described on Page 5). It includes:

- **SMP Orientation** provides volunteers with an overview of the SMP, their host organization, and their role(s) at the SMP.
- **SMP Foundations Training** provides a foundation of knowledge about the SMP program, Medicare, and Medicare fraud and abuse.
- The three **role-specific training** courses prepare volunteers to perform specific tasks related to the following role(s) within the SMP: making group presentations, counseling, and handling complex issues and referrals.
- SMPs also offer additional training as needed.

AoA's Standards for SMP Volunteer Training

To ensure national consistency and quality and enhance the safety of beneficiaries and volunteers, AoA has established SMP volunteer training standards. These standards are explained in the SMP Cooperative Agreement and in AoA's Volunteer Risk and Program Management policies.



The SMP Cooperative Agreement with AoA

As described in the Cooperative Agreement with AoA, found within the most recent SMP Program Announcement (2012), SMPs “will develop the capacity to effectively recruit, screen, train, and manage a volunteer workforce to carry out activities that will achieve SMP program objectives.” Also, SMPs will ensure that “volunteers assigned to beneficiary education and assistance roles will successfully complete the SMP Foundations Training course, or an approved equivalent.”

Successful Training Completion

To successfully complete each training course, volunteers must pass the associated assessment with a score of 80 percent or higher. Passing the assessment will determine whether or not each volunteer is qualified on that topic. SMPs can customize the training materials or even use their own approved training equivalent, if desired, as long as their volunteers successfully complete the national SMP assessment(s) applicable to their role/s.

Currently, the SMP Foundations assessment is available. As additional role-specific training assessments become available, SMP volunteers filling those roles will be required to demonstrate role-specific competencies by passing the associated assessments. For more information on volunteer roles and training standards, see Page 5.

AoA's Standards for SMP Volunteer Training, continued

Volunteer Risk and Program Management (VRPM) Policies

Volunteer program management best practices dictate that volunteer training is just one component of developing and managing a successful volunteer program. There are many steps to take in the volunteer involvement cycle before training even begins – i.e., position design, recruitment, screening, placement, and orientation.

With this in mind, AoA has developed Volunteer Risk and Program Management (VRPM) policies, which become effective in three stages from June 2013 through December 2014. These policies are intended to decrease and manage risks related to volunteer involvement in the SMP program, in addition to improving the overall process of engaging volunteers in the SMP program.

The SMP Resource Center has developed comprehensive resources to help SMPs implement these policies. Ongoing support through webinars and networking opportunities will be provided. VRPM resources are on the SMP Resource Center Website (www.smpresource.org), under **Resources for SMPs**, then [VRPM](#).

VRPM Policies and AoA's Standards for Training

The SMP Volunteer Training Program is intended to help SMPs meet AoA's orientation and training requirements in VRPM Policies 3.66 – 3.74, for example:

- **[Policy 3.66: Orientation](#)** states that “all volunteers receive orientation”.
- **[Policy 3.67: Training](#)** states that “minimum initial and ongoing volunteer training requirements are established by AoA and involve the delivery of a standardized volunteer training program tailored to specific volunteer roles... Volunteers fulfill all mandatory training requirements before any work is assigned.”

Although VRPM training policies take effect in 2014, many resources are available now (see Pages 6 - 12 and 15 - 16).

AoA's Standards for SMP Volunteer Training, continued

Volunteer Roles and Positions of Trust

For proper volunteer risk and program management, the amount and type of training needed for each volunteer are determined by their role(s) with the SMP (VRPM [Policy 1.7](#)), and whether or not that role is a position of trust (VRPM [Policy 1.8](#)). For details, see the [VRPM Policy Implementation Guide](#).

The [SMP Volunteer Training Matrix](#) (Appendix A) identifies AoA' standards regarding training for each SMP volunteer role, as described in VRPM [Policy 1.7](#).

As described in VRPM [Policy 1.7: Volunteer role classifications](#),

SMPs may create volunteer positions and related position descriptions that incorporate one or more of the standard roles set forth below. Titles for volunteer positions in the SMP program are not standardized. Volunteers may be qualified to serve in one or more role(s). Standard volunteer roles include, but may not be limited to, the following:

- *Distributing information*
- *Assisting with administration*
- *Staffing exhibits*
- *Making group presentations*
- *Counseling*
- *Handling complex issues and referrals*
- *Other roles*

As described in VRPM [Policy 1.8: Positions of trust](#),

A position of trust involves access to at least one of: beneficiaries or other vulnerable people, personal or confidential information, money or other valuables.

Of the standard SMP volunteer roles outlined above, the following are definitely positions of trust:

- *Staffing exhibits*
- *Making group presentations*
- *Counseling*
- *Handling complex issues and referrals*

Volunteers in Multiple Roles

Volunteers may serve in more than one role, and if so, must:

- Successfully complete training for each role ("successful training completion" is described on Page 3);
- Complete training in the proper order (see Appendix A: [SMP Volunteer Training Matrix](#));
- Be trained to the highest standard for each role, even if they only perform some roles occasionally (see Appendix A: [SMP Volunteer Training Matrix](#)).

The SMP Volunteer Training Program

Overview

As described on Page 2, the national SMP Volunteer Training Program includes a state-specific orientation and four national training courses. The focus, goal, and audience for each course are provided below; detailed descriptions follow on Pages 8 - 12. Other training that may also be offered to SMP volunteers is described on Pages 13 - 14.

Training	Focus	Goal	Audience
SMP Orientation (state-specific)	General knowledge	To provide an overview of the purpose and values of the SMP, the nature and operation of the program or activity for which they are recruited, and the purpose, duties and requirements of the role that they are accepting.	All SMP volunteers
SMP Foundations Training	General knowledge	To provide a foundation of knowledge in three main content areas: the SMP program, Medicare basics and Medicare fraud and abuse.	All SMP volunteers in “positions of trust”, i.e. staffing exhibits, making group presentations, counseling, and/or handling complex issues & referrals (see Page 5)
SMP Group Education Training	Role-specific	To provide the necessary skills and resources to present the SMP message consistently to groups of Medicare beneficiaries, caregivers, and other applicable groups across the country.	Volunteers who will present group education sessions, and who have successfully completed SMP Foundations Training
SMP Counselor Training	Role-specific	To provide the necessary skills and resources to handle one-on-one counseling sessions and simple inquiries consistently across the country.	Volunteers who will handle one-on-one counseling sessions, and who have successfully completed SMP Foundations Training
SMP Complex Issues & Referrals Training	Role-specific	To provide the necessary skills for handling complex issues and, when necessary, conducting referrals to the appropriate entity.	Volunteers who will handle complex issues, and who have successfully completed SMP Foundations AND SMP Counselor Training

SMP VOLUNTEER TRAINING PROGRAM

The SMP Volunteer Training Program, continued



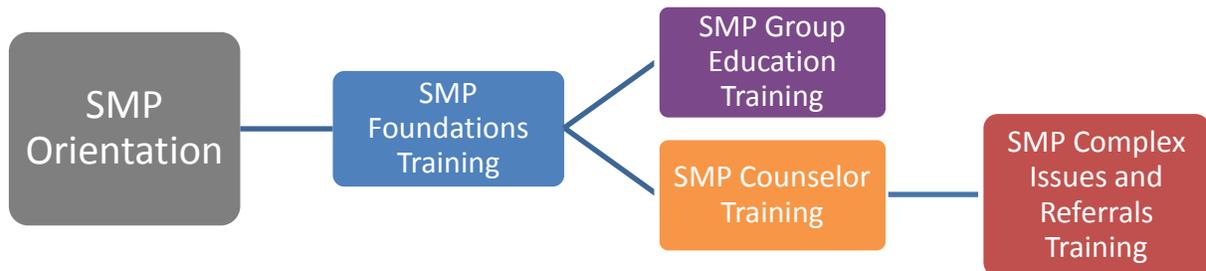
The four national SMP training courses each include the entire array of training materials – the manual, classroom training, online training, and all related resources.

Once the national SMP Volunteer Training Program is complete, the following resources will be available for each of the four training courses. A timeline is provided on Pages 15 - 16.

Resource	Description
Manual	SMPs may want to give participants the appropriate course manuals in advance, perhaps at orientation. This would allow participants to review the content prior to classroom and/or online training.
Classroom training	Promotes an interactive experience for participants and includes PowerPoint presentations, trainer's notes, classroom activities, and answer keys.
Online training	Allows participants to take the training at their own pace, on their own schedule, from any location that has internet access. Provides an interactive experience and includes online versions of classroom activities.
CD training	Equivalent to the online course but accessible to those without an internet connection.
Assessment	Designed to assess the knowledge level of each participant, to confirm their retention of information learned during training.
Evaluation form	Allows SMPs to request feedback from participants.
Certificates	Allow SMPs to acknowledge participation in training.

The SMP Volunteer Training Program, continued

SMP Orientation



As stated in VRPM [Policy 3.66: Orientation](#), all volunteers receive orientation to:

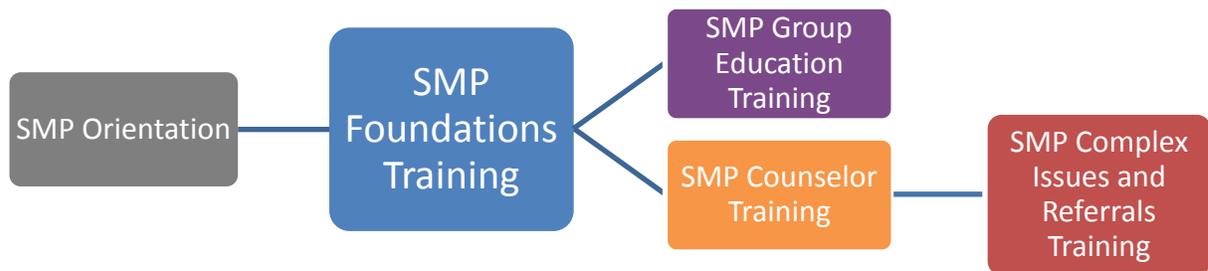
- *An overview of the purpose and values of the SMP*
- *The nature and operation of the program or activity for which they are recruited*
- *The purpose, duties and requirements of the role that they are accepting*

All SMP volunteers receive orientation before beginning work with the SMP, and prior to attending training (if applicable). A suggested outline is available to help SMPs develop their own state-specific orientation and can be accessed at: www.smpresource.org > Resources for SMPs > Training > Volunteer Training > [SMP Orientation](#).



The SMP Volunteer Training Program, continued

SMP Foundations Training



SMP Foundations Training is not intended to prepare volunteers to perform any specific role at the SMP, but it provides SMP volunteers with a solid foundation of knowledge about the SMP program, Medicare, and Medicare fraud and abuse. After volunteers successfully complete SMP Foundations Training, they should take additional role-specific training as appropriate for their role with the SMP (see Page 5).

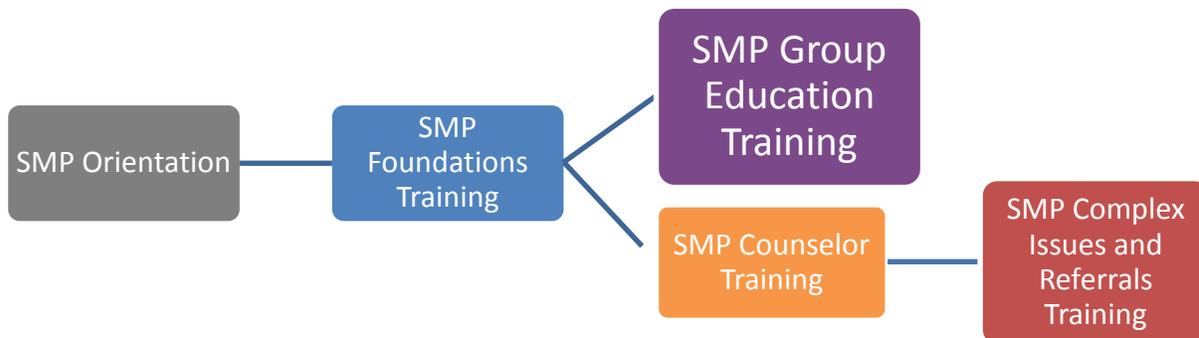
The SMP Foundations Training course includes:

- 1) Manual
 - a. Chapter 1 – SMP Program
 - b. Chapter 2 – Medicare
 - c. Chapter 3 – Medicare Fraud & Abuse
- 2) Classroom training
 - a. Instructions for trainers
 - b. Handouts for classroom training activities
 - c. Answer Keys to the handouts
 - d. PowerPoint presentations with trainer's notes
- 3) Online training
- 4) Assessment, answer form, answer key
- 5) Evaluation Forms

Access the resources on the SMP Resource Center website: www.smpresource.org
> Resources for SMPs > Training > Volunteer Training > [SMP Foundations Training](#).

The SMP Volunteer Training Program, continued

SMP Group Education Training



SMP Group Education Training provides presenters of SMP group education sessions with the necessary skills and resources to present the SMP message consistently to groups of Medicare beneficiaries, caregivers, and other applicable groups across the country. Chapter 1 and the appendices of the *SMP Group Education Manual* are also used with volunteers who staff exhibits to help prepare them to represent the SMP. Prior to taking this training, volunteers must successfully complete SMP Foundations Training.

The SMP Group Education Training classroom materials include:

- 1) Manual
 - Chapter 1: Presentation Content
 - Chapter 2: Customizing the Presentation
 - Chapter 3: Giving an SMP Presentation
 - Appendix A: Presentation Checklists
 - Appendix B: PowerPoint Templates
- 2) Classroom training
 - PowerPoint (PPT) presentation with trainer's notes
 - Handouts for classroom training activities
 - Answer keys to the handouts

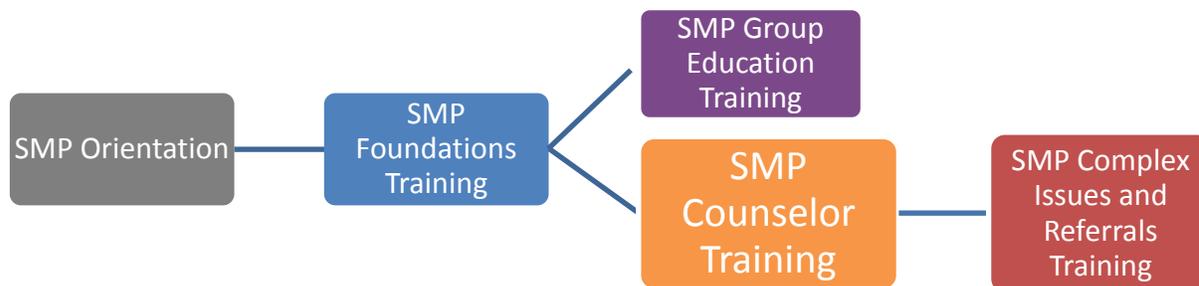
State and Local Information

Throughout the SMP Group Education and SMP Counselor Training Manuals, "State and Local" boxes like this one allow you to keep track of information and resources that apply at a local level, in addition to the national information and resources provided.

At the writing of this guide, self-paced online and CD training was still under development by AoA (see Page 16 for the timeline). All available resources for this course are housed on the SMP Resource Center website: www.smpresource.org > Resources for SMPs > Training > Volunteer Training > [SMP Group Education Training](#).

The SMP Volunteer Training Program, continued

SMP Counselor Training



SMP Counselor Training provides SMPs with the necessary skills and resources to handle one-on-one counseling sessions and simple inquiries consistently across the country. Chapter 1 and the Appendices of the *SMP Counselor Manual* are also used with volunteers who staff exhibits and make group presentations, to help prepare them to answer simple inquiries. Prior to taking this training, volunteers must successfully complete SMP Foundations Training.

The SMP Counselor Training classroom materials include:

- | | |
|--|---|
| <p>1) Manual</p> <ul style="list-style-type: none"> • Chapter 1: Types of SMP Questions • Chapter 2: Determine the Appropriate Response • Chapter 3: Counseling Skills • Chapter 4: Handling SMP Questions • Appendix A: Types of SMP Questions Flow Chart • Appendix B: Summary of SMP Partners • Appendix C: Frequently Asked Questions • Appendix D: Process Checklist • Appendix E: Tracking Document | <p>2) Classroom training</p> <ul style="list-style-type: none"> • PowerPoint (PPT) presentation with trainer’s notes • Handouts for classroom training activities • Answer keys to the handout |
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“Wearing Other Hats”

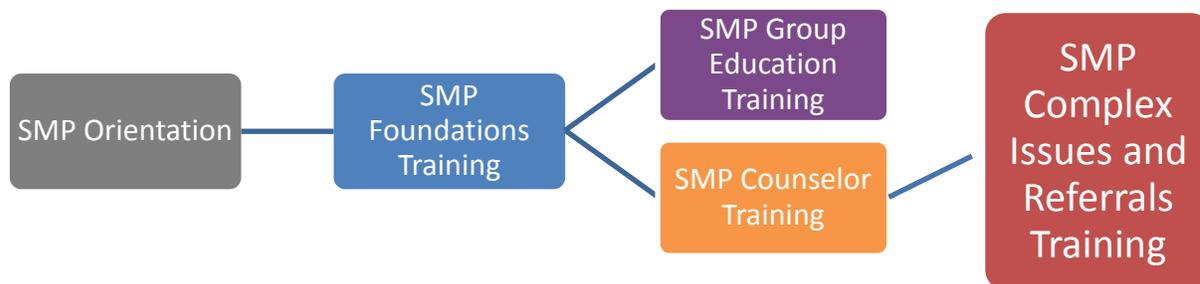


Several of the “state and local” boxes in the SMP Counselor Training Manual give you the opportunity to talk about SMP versus other counseling services that may be handled by your SMP volunteers (see Page 14).

At the writing of this guide, self-paced online and CD training was still under development by AoA (see Page 16 for the timeline). All available resources for this course are housed on the SMP Resource Center website: www.smpresource.org > Resources for SMPs > Training > Volunteer Training > [SMP Counselor Training](#).

The SMP Volunteer Training Program, continued

SMP Complex Issues and Referrals Training



SMP Complex Issues and Referrals Training provides the necessary skills for handling complex issues and, when necessary, conducting referrals to the appropriate entity. Prior to taking this training, volunteers must complete SMP Foundations Training and SMP Counselor Training or an approved equivalent. Not all SMPs choose to have volunteers involved with complex issues. As mentioned earlier, it is up to each SMP to determine the role(s) that each volunteer will play at your SMP, and then provide the appropriate training for each role.

The *SMP Complex Issues and Referrals Training Manual* includes:

- Chapter 1: Complex Issues and the SMP Role
- Chapter 2: When You Suspect Medicare Error
- Chapter 3: When You Suspect Medicare Fraud or Abuse
- Chapter 4: When You Suspect Part D or Part C Marketing Violations
- Chapter 5: Medicaid Fraud and other Complaints
- Chapter 6: Consumer Protection Issues and Remedies
- Chapter 7: Case Studies: Applying What You Have Learned
- Appendix A: Types of SMP Questions
- Appendix B: SMP Unique ID User Guide
- Appendix C: Map of ZPIC Zones
- Appendix D: SMART FACTS Job Aid: Complex Issues Basic Data Entry
- Appendix E: SMART FACTS Job Aid: Complex Issues, Referrals
- Appendix F: SMP Referrals to the OIG Hotline
- Appendix G: Can They Do That?
- Appendix H: Flow Chart – Complex Issues and Referrals
- Appendix I: Glossary of Terms

At the writing of this guide, classroom, self-paced online, and CD training was still under development by AoA (see Page 16 for the timeline). All available resources for this topic are housed on the SMP Resource Center website: www.smpresource.org > Resources for SMPs > Training > Volunteer Training > [SMP Complex Issues and Referrals Training](#).

The SMP Volunteer Training Program, continued

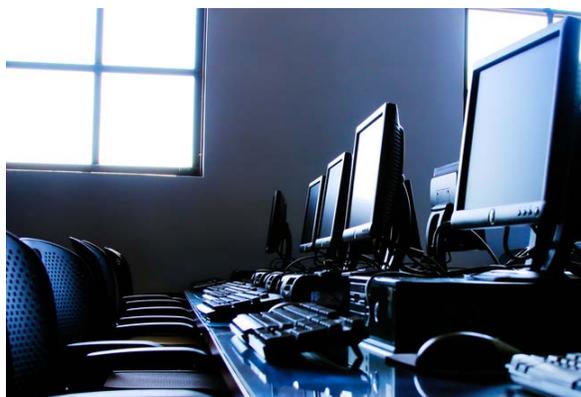
Other Training

SMPs may offer additional training to SMP volunteers as needed to help them fulfill their role(s) with the SMP. Additional training may also be provided to SMP volunteers who will perform work for partner organizations.

Additional SMP Training

Here are some examples of additional training that you may want to offer, depending upon the role(s) of SMP volunteers:

- SMART FACTS training
 - Training recordings, job aids, and other resources are available at www.smpresource.org > Resources for SMPs > SMART FACTS > [SMART FACTS Training](#)
- Cultural sensitivity training
 - Resources are available at www.smpresource.org > Resources for SMPs > Training > Other Training > [SMP Cultural Competency Webinar 2/22/11](#)
- Boundaries training
- Confidentiality training
- Customer service training
- On-the-job training
- Ongoing and update training
 - When there are national changes which are important for SMP volunteers to understand
 - When changes occur at a local or state level that impact volunteers



[Policy 1.7](#) and “Other” SMP Volunteer Roles

Training for “other” SMP volunteer roles is to be determined by the SMP director and/or coordinator of volunteers, based on the role, as described in [Policy 1.7](#).

The SMP Volunteer Training Program, Other Training, continued

SMP versus Other Programs

In some states, volunteers assigned to SMP work may also “wear other hats.” Put another way, this means individual volunteers may perform work for multiple programs, sometimes concurrently. For example, they may also do work for a SHIP (State Health Insurance Assistance Program), an AAA (Area Agency on Aging), or an ADRC (Aging and Disability Resource Center). These are just a few common programs that, like SMP, serve older adults, often with the help of volunteers. SMPs who work closely with other programs may choose to offer additional training; for example SMPs who are also SHIP programs may offer more advanced Medicare training when cross-training their volunteers.



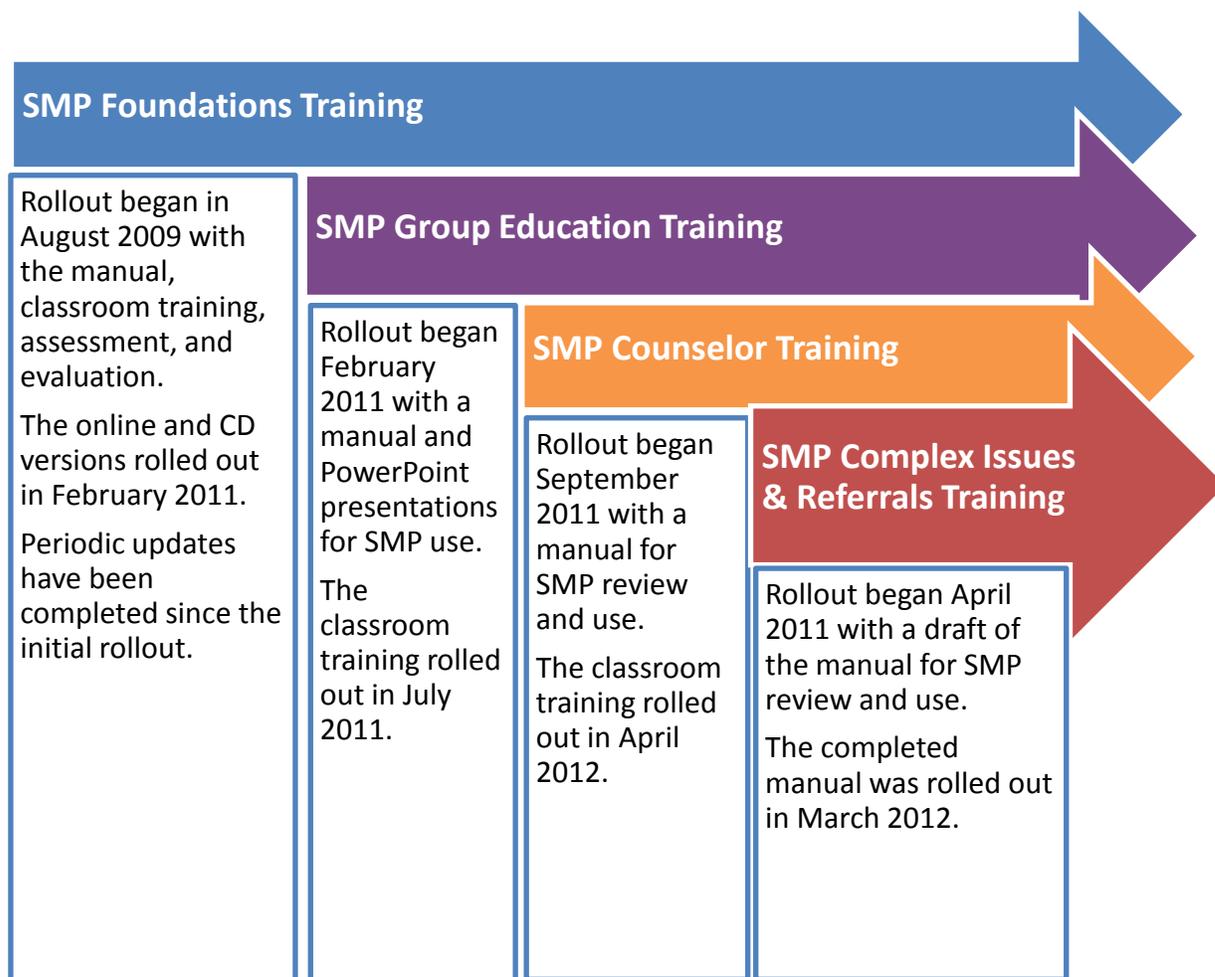
It is outside the scope of the SMP Volunteer Training Program to address the training, activities, and reporting requirements of other programs. If you have SMP volunteers who wear multiple “hats,” make sure you provide training to help them understand the difference between work done by the SMP versus work done by other programs in your state and which “hat” they are wearing when conducting **and** reporting their activities.



The SMP Volunteer Training Program, continued

Rollout of Resources: Past, Present and Future

The rollout of the SMP Volunteer Training Program began in August, 2009 with SMP Foundations Training, and will take several years to complete. The SMP Resource Center has written the training manuals for each course. AoA is contracting for development of the classroom, online, and CD resources for each course, based on those manuals. A rollout history of the four national training courses is shown below, with a timeline for present and future resources on the next page.



SMP VOLUNTEER TRAINING PROGRAM

The SMP Volunteer Training Program, Rollout of Resources, continued

SMP Volunteer Training Program resources are in varying stages of development for each of the four national courses. The grid below provides an overview of available resources as of July 2012 and a timeline of when remaining resources will be available.

	SMP Foundations Training	SMP Group Education Training	SMP Counselor Training	SMP Complex Issues & Referrals Training
Manual	SMP Foundations Training Page	Group Education Training Page	SMP Counselor Training Page	SMP Complex Issues & Referrals Training Page
Classroom Training (PPTs, handouts, & trainer's notes)				Coming 2012
Online Training (self-paced training & handouts)				Coming 2013
CD version (self-paced training & handouts)	No longer available	Coming 2013	Coming 2013	Coming 2013
Assessment	SMP Foundations Training Page	Coming 2012 /2013	Coming 2012/2013	Coming 2013/2014
Evaluation		Group Education Training Page	SMP Counselor Training Page	Coming 2013
Certificates (see Page 22)				Coming 2013
Updates / Continuing Education	As determined necessary by AoA, the SMP Resource Center, and SMPs			

Implementing SMP Volunteer Training

SMP Volunteer Training Support Webinars: Training for SMPs

To accompany the training resources described on the previous pages, SMP Volunteer Training Support webinars are held periodically to support SMP implementation of new volunteer training – a “train the trainer” model. Recordings of past train-the-trainer webinars and related resources are available on the SMP Resource Center website: www.smpresource.org > Resources for SMPs > Training > Volunteer Training > [SMP Volunteer Training Support Series](#). Also see the Calendar of Events for notices of future training support webinars: www.smpresource.org > Resources for SMPs > [Calendar of Events](#).

Step-by-Step Guide to Implementing Training

Below are suggested steps for implementing SMP volunteer training in your area.

SMP Volunteer Training Implementation Checklist

A summary checklist of the steps to a successful training implementation is provided here, with details for each step of the process on the following pages.

- Step 1: Review the training implementation process
- Step 2: Identify a training coordinator
- Step 3: Review all SMP Volunteer Training Program resources
- Step 4: Determine who needs to be trained in each course
- Step 5: Schedule the training and provide manuals
- Step 6: Conduct the training
- Step 7: Conduct the assessment
- Step 8: Score the assessment
- Step 9: Training wrap-up
- Step 10: Determine next steps for training and/or work



Implementing the SMP Volunteer Training Program, continued

Step One: Review the training implementation process

Read this entire Implementation Guide to familiarize yourself with the training implementation process and what you will need to do for a successful rollout.

Step Two: Identify a training coordinator

Identify a training coordinator if you have not already done so. The training coordinator may be the SMP director, coordinator of volunteers, another SMP staff member, or even a volunteer. The training coordinator should also review the Implementation Guide and will be responsible for completing (or helping to complete) the remaining steps in this training implementation process.

The training coordinator should be:

1. A good public speaker if he or she will be doing the actual training;
2. Able to commit the time to establish and implement the program;
3. Knowledgeable about your program's structure, schedule, policies and procedures;
4. Familiar with the roles and responsibilities of your volunteers
5. Able to establish good rapport with volunteers and volunteer host organizations

Step Three: Review all SMP Volunteer Training Program resources

You and/or your training coordinator should familiarize yourself with the entire array of volunteer orientation and resources available. With so much material to review, it's important to allow plenty of time to complete your review of the resources well in advance of your first scheduled training session. Pay close attention to the PowerPoint notes and/or trainer's guide or trainer's notes (as available) for each course; they provide detailed information and instructions to help present the training.

As you review these resources, consider the best format for your training, given the available resources: classroom, online, CD, or a blended learning approach that incorporates more than one format. For example, some SMPs have used the online version of SMP Foundations to provide participants with a preview of the course and condense the amount of time needed in the classroom. Refer to the SMP Volunteer Training Support webinars and resources provided by the SMP Resource Center as needed (see Pages 15 - 17).

Implementing the SMP Volunteer Training Program, continued

Step Four: Determine who needs to be trained in each course

The SMP Volunteer Training Program applies not only to new SMP volunteers but also to existing volunteers for the following reasons:

- 1) Each of these courses may serve as refresher training to remind experienced volunteers of important information that they may have forgotten.
- 2) Each course may also serve as update training, informing experienced volunteers about information that may be new or may have changed since they last received training.
- 3) Some volunteers may wish to expand their role with your SMP and will need to take the additional training necessary. For example, they may have originally only planned to present to groups but may later want to also conduct SMP one-on-one counseling sessions.

As discussed on Page 5, the amount and type of training needed for each volunteer depends on the role that they will play at your SMP. A summary is provided below. Also review [Policy 1.7: Volunteer role classifications](#) and the [SMP Volunteer Training Matrix](#) (Appendix A) as needed in order to determine the appropriate training.

Training	Who should take this training?
SMP Orientation	All SMP volunteers should receive orientation prior to training.
SMP Foundations	Intended for SMP volunteers in “positions of trust.” Of the standard national SMP volunteer roles, staffing exhibits, making group presentations, counseling, and/or handling complex issues & referrals are positions of trust (see Page 5). SMP Foundations should precede role-specific training.
SMP Group Education	Intended for volunteers who will present group education sessions. Volunteers who will only staff exhibits should complete at least Chapter 1 and the appendices.
SMP Counselor	Intended for volunteers who answer the telephone and/or handle SMP one-on-one counseling sessions. Volunteers who will only handle simple inquiries should complete at least Chapter 1 and the appendices.
SMP Complex Issues & Referrals	Intended for volunteers who will handle reports of suspected health care fraud, error, or abuse that fit the criteria for SMP complex issues and referrals.

Implementing the SMP Volunteer Training Program, continued

Step Five: Schedule the training and provide manuals

Suggested timeframes for classroom training are provided with each course.

Rather than simply repeating what is covered in the manual for each course, the goal of the classroom experience is to use principles of adult learning to build on the content covered in the manual, incorporating exercises and activities that create a relaxed and engaging environment. The manual serves as a reference guide, not only during training but also after, as the volunteer is conducting their work. You may want to give each volunteer a copy of the appropriate manual prior to training, perhaps during orientation. Having extra time to become familiar with the basic content may enhance their time in the classroom.

Step Six: Conduct the training

The Training Kit for each course provides instructions for conducting the training. See the Trainer's Guide and PowerPoint notes.

Step Seven: Conduct the assessment

In adult learning, the word "assessment" is commonly used instead of the word "test." Many adults feel threatened by test-taking, and calling it an assessment may make them feel more at ease.

As of July 2012, only SMP Foundations Training has an assessment. Eventually, all four courses will have assessments associated with them (see Page 16).

To successfully complete SMP training on a given topic, volunteers must take and pass the assessment with a score of 80 percent or higher. The assessment should be distributed after training has been completed and is designed to gauge a basic level of competency and knowledge based on the content that is provided in the manual and presented in the classroom. The assessment process is "open-book;" participants can use their manual to complete the assessment.

Can anyone "test out" of training?

At your discretion, volunteers with extensive previous training and/or experience can "test out" of the classroom or online training. You may provide these individuals with a copy of the manual prior to or together with the assessment, so they can review the information presented for that course.

Implementing the SMP Volunteer Training Program, continued

Step Eight: Score the assessment

Each volunteer should turn in his/her assessment when completed. Assessments are graded after the class is over. Volunteers are informed later of their score and their pass/fail status. Volunteers who complete a course online or by using the self-paced CD will need to mail or deliver their completed assessment to the SMP.

A passing score is 80 percent (at least 40 out of 50 correct answers).

For those who pass the assessment, see Step 9.

Volunteers should be shown the correct answer for any question they answered incorrectly.

For those who do not pass the assessment the first time, keep in mind that volunteers may struggle with the assessment for any number of reasons:

- The training materials cover a lot of complex information.
- Some volunteers may not be accustomed to the classroom environment or may not do well taking tests, either of which can be stress-inducing.
- Ultimately, some volunteers may not be suited to the content or type of work done by the SMP program, or to a role within the SMP that requires them to be familiar with the content of the training.



If a volunteer does not pass the assessment, review the assessment results, consider the number and nature of the questions missed, and determine what steps to take next.

- You may decide that it's appropriate for your volunteer to study on his or her own or repeat the training and then retake the assessment, or
- You may determine that the volunteer may need to be reassigned to a different role within the SMP, offered non-SMP volunteer work at your agency, or released from the SMP program altogether (see Step 10).

Implementing the SMP Volunteer Training Program, continued

Step Nine: Training wrap-up

Training evaluations and certificates are included in the Training Kit for each course.

- Evaluations give participants a chance to provide feedback on the training. For SMP Foundations Training, two versions of the evaluation form are available:
 - **Course Evaluation:** Used when training is held in a consecutive two-day period.
 - **Chapter Evaluations:** Used INSTEAD OF the course evaluation, when training is broken up by chapter(s) and held on non-consecutive days.
 - Certificates acknowledge participants in two ways:
 - **Certificate of Attendance:** Each volunteer who attends training may be presented with a Certificate of Attendance.
 - **Certificate of Completion:** Each volunteer who passes the assessment (80% or higher) is considered to have successfully completed the training and may also be presented with a Certificate of Completion.
- Note:** As of July 2012, this only applies to SMP Foundations.

Volunteer Hours

Tip: Remember to track all volunteer orientation and training hours!

Step 10: Determine next steps for training and/or work

Training is not meant to replace (or precede) screening and orientation, though it can serve as an additional volunteer management and coaching tool. Once training is completed, use what you have learned about each volunteer to determine which steps you, and they, should take next for additional training and/or to begin work with your SMP.

- For volunteers who struggled in the classroom and/or didn't pass the assessment (or passed after multiple attempts), consider the following:
 - Is the volunteer suited to the tasks required for SMP volunteer work?
 - Is it necessary to re-train, reassign, or release them?
For example, could they be encouraged to perform SMP volunteer work that does not require completing SMP Foundations or the other national role-specific training? For additional guidance, see VRPM [Policy 3.40: Availability of suitable volunteer roles](#).
- For volunteers who will move forward with work at your SMP, determine the role for which they are best suited and what additional training, including on-the-job training, may be needed for them to be successful in their new role(s).

Training is an important component of a successful volunteer program! Additional guidance for training volunteers and managing a volunteer program is provided within the SMP Volunteer Risk and Program Management [Policy Implementation Guide](#) at www.smpresource.org > Resources for SMPs > VRPM > [VRPM Implementation](#).

SMP Volunteer Training Matrix

This training matrix is based on the training materials developed by the SMP Resource Center. It identifies recommended training for each standard SMP volunteer role, as described in VRPM [Policy 1.7](#). A brief description of each type of training is provided on Page 2. For additional information, see the [SMP Volunteer Training Implementation Guide](#).

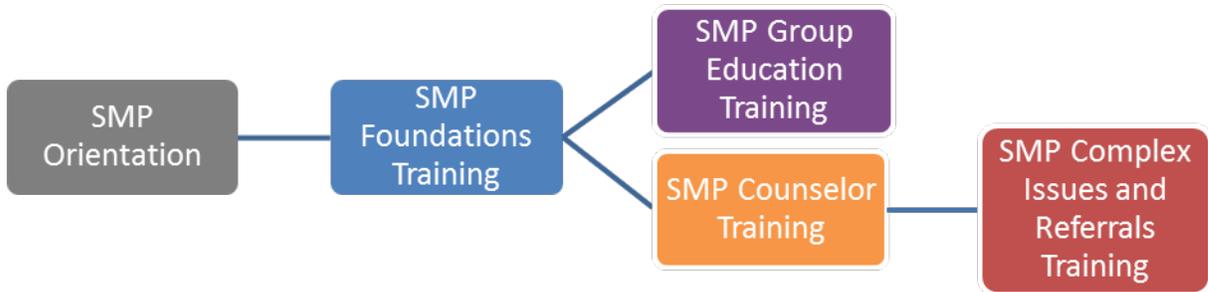
For proper volunteer risk and program management, determine the role(s) that each volunteer will play at your SMP, then provide the appropriate training for each role. Volunteers who will perform multiple roles must show competency in each role, and must be trained to the highest standard of their roles even if they only perform the higher standard role occasionally.

		Training				
		Orientation	Foundations	Group Education	Counselor	Complex Issues & Referrals
Volunteer Role	Distributing information	X				
	Assisting with administration	X				
	Staffing exhibits	X*	X	X**	X***	
	Making group presentations	X*	X	X	X***	
	Counseling	X*	X		X	
	Handling complex issues & referrals	X*	X		X	X
	Other Roles	X*	TBD	TBD	TBD	TBD

* For volunteers who take training beyond SMP Orientation, the proper order is illustrated below. When applicable, SMP Foundations Training or an approved equivalent is taken after SMP Orientation, and role-specific training is taken after SMP Foundations Training.

** For the staffing exhibits role, use the SMP Group Education Manual, Chapter 1 and Appendices.

*** For the staffing exhibits and making group presentations roles, use the SMP Counselor Manual, Chapter 1, and Appendices.



SMP Volunteer Training: Brief Descriptions

SMP Volunteer Training Resources are available on the SMP Resource Center Website: www.smpresource.org > Resources for SMPs > Training > [Volunteer Training](#). For more information, see the [SMP Volunteer Training Implementation Guide](#).

SMP Orientation

- All volunteers receive orientation before beginning work with the SMP. A sample template is provided by the Center. As described in [Policy 3.66](#), all volunteers must receive orientation prior to beginning work for the SMP.

SMP Foundations Training

- Provides SMP volunteers with a foundation of knowledge in three main content areas: the SMP program, Medicare basics and Medicare fraud and abuse. This curriculum meets the AoA basic training requirement for SMP volunteers, as stated in the SMP Cooperative Agreement with AoA. However, SMP volunteers who will not be in a position of trust (see [Policy 1.8](#)) are exempt.

SMP Group Education Training

- Provides presenters of SMP group education sessions with the necessary skills and resources to present the SMP message consistently to groups of Medicare beneficiaries, caregivers and other applicable groups across the country.

SMP Counselor Training

- Provides SMPs with the necessary skills and resources to handle one-on-one counseling sessions and simple inquiries consistently across the country.

SMP Complex Issues and Referrals Training

- Guides SMPs through the process of managing complex issues and, when necessary, conducting referrals to the appropriate entities.

Other Training

SMPs may offer additional training to volunteers, as needed, including state-specific training based on the needs of the local SMP. Training for “other” roles (as defined in [Policy 1.7](#)), is to be determined by the SMP director and/or coordinator of volunteers based on the role.

Here are examples of additional training SMPs may choose to offer, based on the roles of SMP volunteers:

- [SMART FACTS Training](#)
- Cultural sensitivity training (such as that described in the [SMP Cultural Competency Webinar 2/22/11](#))
- Boundaries training
- Confidentiality training
- Customer service training
- On-the-job training
- Ongoing / update training, i.e. any time national materials change, and/or when changes occur at a local / state level