

Instructions for using the Online Counselor Certification Tool

www.shiptacenter.org

Counselor (Participant) User Guide

When viewing online, this Table of Contents hyperlinks to the specified topics

Contents

Introduction	2
System Requirements	2
Accessing the Certification Tool.....	2
Overview of the Certification Tool page	5
Taking an Exam	6
Certificates of Completion	8
Support	8

Introduction

Welcome to the online counselor certification tool offered by the SHIP National Technical Assistance Center (SHIP TA Center) at www.shiptacenter.org! You are likely receiving this guide because your SHIP program has decided to use this tool for counselor certification. This guide is intended to assist you in effectively accessing and using our online system. Specific certification questions, certification timing, and other certification guidelines are determined at the state, regional, and local level. Please follow your SHIP program's additional guidelines for using this tool and for becoming (or remaining) a certified counselor.

System Requirements

Before getting started, please note that it is best to use any of the following internet browsers with Java Script enabled to access the OCCT:

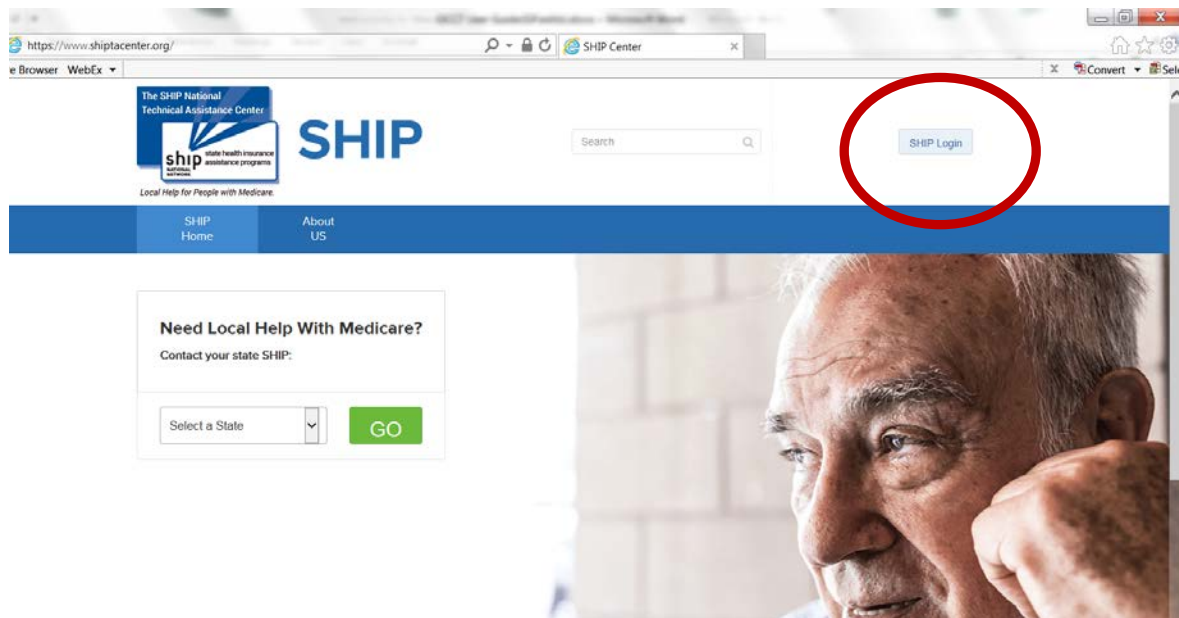
Internet Explorer 9 and up, Firefox, Google Chrome, Safari

Note that all major internet browsers will likely have Java Script enabled by default.

Accessing the Certification Tool

The certification tool can only be accessed by registered users at www.shiptacenter.org.

1. Click on SHIP Login from our home page. (Please note that the photos on our home page rotate. The photo depicted below is only one of several that appear).



- Registered users log in by entering their email address and password.

« Back to home page

Login

Email address

Password

Login

[Forgot your password?](#)

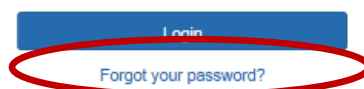
Not a Registered User?

This webpage is intended only for State Health Insurance Assistance Program (SHIP) representatives. If you are a member of the general public and wish to learn more about the SHIP program, click on "Learn about SHIPs" below. If you are a SHIP staff member, counselor, or volunteer who needs access, click on "Submit request to be a Registered User."

[Submit request to be a Registered User](#)

SHIPs empower Medicare beneficiaries by providing free, in depth, insurance counseling and assistance.

- Non-registered users who need access to this tool can submit a registration request. (See the green arrow pointing to the green registration button above.)
- If you think you are registered but don't remember your password, click on the blue *Forgot your password?*



- The window below will appear. Enter your email address and click "Submit."

The SHIP National Technical Assistance Center

SHIP state health insurance assistance programs

Local Help for People with Medicare

SHIP Home About US

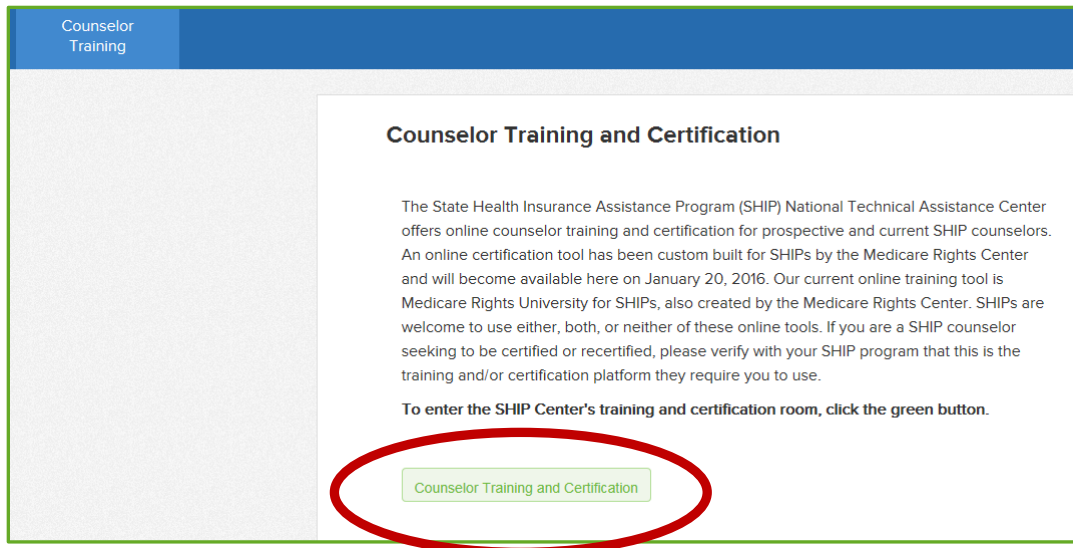
Forgotten Password

Email address

Submit

- After you click submit, you will be sent an email from info@shiptacenter.org explaining how to re-set your password. If the email does not arrive, check your junk mail or spam folder. Make sure to mark info@shiptacenter.org as a safe sender.

7. Upon logging in, Counselor-in-Training users will automatically see the page shown below and nothing else. All other users will have additional menu options and will need to click on the Counselor Training menu to access the Online Counselor Certification and Training Tool (OCCT).
 - a. Brief explanatory text precedes the green “Counselor Training and Certification” button.
 - b. Click on the green button to proceed to the certification tool.



8. Once you are on the home page, click the “Certification Tool” link in the top menu.



Overview of the Certification Tool page

You will see a table with three tabs on the Certification Tool page:

- Exam List
- My Information
- My Results

Exam List

This tab displays a list of all exams for which you are currently scheduled. Exams are scheduled by a designated SHIP staff administrator for your program. It is the role of a designated SHIP staff administrator to alert you when you have been scheduled to take an exam. If you have *not* been scheduled for any exams, the Exam List will be empty and no exams will appear in the *Exam Name* column. In the example below, one exam has been scheduled, titled "Sample Recertification Exam." To take an exam, click on the blue [Take Exam](#) link associated with that exam (circled below).

SHIP Certification Tool

Exam List

My Information

My Results

Exam Name

Sample Recertification Exam

Take Exam

Take Exam

Note: After you have taken an exam, it will not automatically disappear from this list. The Exam Name will remain on the list until a SHIP staff administrator removes it.

My Information

This tab displays your Participant ID, the email address you use to log in, your state abbreviation, and a list of exams for which you have been scheduled. In the example below, only one exam has been scheduled for this sample participant.

Exam list	My Information
Participant ID: 1971 Login Name: gpaulson@shiptacenter.org Participant State: NY Scheduled for: Sample Recertification Exam	

My Results

This tab displays results of all exams you have taken. You can see the answers you selected for a specific exam by clicking the *View Selected Answers* link. The first six columns are sortable. You can click the column name to toggle ascending or descending order.

Exam List		My Results					
Name	Exam	Date Taken	Time Spent	Points Scored	Possible Points	Pass/Fail	Answers
Paulson, Ginny	Sample Custom	1/13/16 17:08	00:06:48	9	10	Pass	View Selected Answers

Taking an Exam

If your administrator scheduled you for an exam, you will see the name of the exam on the SHIP Certification Page and you will be able to take the exam from there.

1. Click *Take Exam* next to its name and follow any directions provided by your administrator.

Exam List		My Information	My Results
Exam Name		Take Exam	
Sample Recertification Exam		Take Exam	

2. Selecting the correct answers is done by simply clicking on their text.

Exam List	Sample Recertification Exam
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Sample Recertification Exam

Good luck!

Question 1. If Lánh takes advantage of the 30-day "free look" period when switching his Medigap policies, he will have to:

Notify CMS of this decision

Disclose all of his health information to the Medigap before enrolling

Pay two premiums for the transitional month, one to his current plan and one to his new plan

Agree to never have a Medicare Advantage Plan again should he choose the Medigap

3. Make sure to click the *Submit* button after you answer all the questions. Otherwise your exam will not be graded.

Question 50. The Advanced Beneficiary Notice (ABN) is used to inform Medicare beneficiaries of what?

- That Original Medicare is likely to reject a claim for services in whole or in part
- That a procedure is experimental
- That the beneficiary needs a referral in order to see this kind of provider
- None of the above**

Submit

If your exam has a defined time limit, we strongly suggest completing it in one sitting. While the system will continue to track remaining time even if you leave the page, your exam will not be submitted for grading unless you have the exam opened in your browser when the time runs out.

If you run out of the allotted time while you're still on the exam's page, your exam will be submitted automatically.

If you run out of the allotted time while you are no longer on the exam's page, that attempt will be counted as one of your allowed attempts, even though the exam will not be graded.

Certificates of Completion

Certificates of completion are available for download after you pass a scheduled exam(s).

Certificates are only available for exams with a set passing score. Each certificate will automatically fill in your information, including your name and SHIP, name of the exam, and date of successful completion. This is what you will see:

SHIP Certification Tool

Exam List	My Information	My Results
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Exam Name	Take Exam	Get Certificate
Cert Test	Take Exam	Get Certificate
Update Exam	Take Exam	Passing Score Required
Sample Exam - 25 questions	Take Exam	Not Available

You can get your certificate after passing an exam. Click on the link to open the PDF in your browser.

If you do not pass an exam, you cannot get the certificate

Certificates are not available for exams without set passing score

Support

Please contact your SHIP administrator with any questions related to your exam and the Certification Tool.

For technical assistance with the software, contact the SHIP National Technical Assistance Center at info@shiptacenter.org or 877-839-2675.

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