



# SENIOR HEALTH INSURANCE INFORMATION PROGRAM SHIIP VOLUNTEER APPLICATION

**First Name:** \_\_\_\_\_ **M.I.:** \_\_\_\_\_ **Last Name:** \_\_\_\_\_

**Address (mailing)** \_\_\_\_\_

**Address (home)** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_ **County** \_\_\_\_\_

**Home Telephone:** \_\_\_\_\_ **Cell Phone:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**1. Check the volunteer position(s) for which you are applying:**

- Counselor** – provide one-on-one assistance to help Medicare beneficiaries, their caregivers or representatives with questions and problems related to Medicare & related health insurances
- Computer Assistant** – assist counselor with Medicare beneficiary prescription drug information entry on Medicare website
- Office Assistant** – assist coordinator with scheduling counselor/client appointments

**2. Current/Past Employment Experience (please list dates you worked for each):**

**3. Current/Past Volunteer Experience (please list dates you volunteered for each):**

**4. How did you learn about SHIIP?**



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5. Why do you wish to be a volunteer?

6. Do you own a computer?  Yes  No

What computer programs are you comfortable using? (e.g., E-mail, Internet, Word, Excel, Access)

7. Are you fluent in any language other than English?  Yes  No

If you answered yes, list languages: \_\_\_\_\_

8. Please describe any current or past experience you or your spouse (if married) have had working for an insurance or financial planning company/agency?

9 To ensure the safety of our clients, volunteers and the communities we serve, we conduct criminal background checks for counselors, computer volunteers and office assistant volunteers. Please sign and date below to authorize this check.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

**COUNSELOR VOLUNTEERS ONLY:**

Would you be interested in doing presentations?  Yes  No

Please list your speaking experience:

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Please submit application to SHIIP via Email – [shiip@iid.iowa.gov](mailto:shiip@iid.iowa.gov)

Fax – Attn: SHIIP: (515) 281-3059 or

Mail to SHIIP, Two Ruan Center, 601 Locust St, 4<sup>th</sup> Floor, Des Moines, Iowa 50309  
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**SHIIP OFFICE USE ONLY:**

Sponsor Site: \_\_\_\_\_

Region #: \_\_\_\_\_

Date of birth \_\_\_\_\_



## SENIOR HEALTH INSURANCE INFORMATION PROGRAM SHIIP VOLUNTEER COUNSELOR JOB DESCRIPTION

**DESCRIPTION:** Provide one-on-one assistance to help Medicare beneficiaries, their caregivers or representatives with questions and problems related to Medicare & related health insurances. Counselors also assist their sponsor site to create awareness of SHIIP services in the county; for example, informal discussions with partners or group presentations.

### **RESPONSIBILITIES:**

- Complete new volunteer counselor certification requirements.
- Provide confidential/objective individual counseling to beneficiaries/representatives on Medicare and related health insurance issues.
- Advocate on behalf of beneficiaries to help them resolve Medicare and related health insurance issues.
- Educate individual beneficiaries on Medicare related issues.
- Serve clients regardless of gender, age, disability, ethnicity, race, income, or sexual orientation.
- Complete counselor annual recertification requirements.
- Utilize SHIIP and Medicare materials and resources to stay up-to-date on issues affecting Medicare Beneficiaries
- Maintain the SHIIP Volunteer Counselor Handbook to keep information current.
- Use Medicare internet-based programs to help clients compare prescription drug plans.
- Assess beneficiary needs and make appropriate referrals when necessary.
- Comply with SHIIP policies and procedures, including those regarding confidentiality and reporting of SHIIP activities.
- Promote SHIIP in your community.

### **DESIRED QUALIFICATIONS:**

- Ability to listen, identify beneficiary issues, and problem solve
- Ability to maintain confidentiality
- Willingness to advocate on behalf of beneficiaries with Medicare
- Ability to work independently or as a team
- Effective oral and written communication skills
- Good organizational skills
- Willingness and ability to learn and retain information
- Confidence using the computer and the internet
- Sensitivity in working with diverse populations
- *Optional: Ability to present information in a group setting.*



## SENIOR HEALTH INSURANCE INFORMATION PROGRAM SHIIP VOLUNTEER COUNSELOR REQUIREMENTS

**DESCRIPTION:** SHIIP Counselors work one-on-one to provide information to Medicare beneficiaries, assist them to make wise decisions regarding their Medicare benefits and promote SHIIP within their communities.

### **REQUIREMENTS:**

- Be 21 years of age or older.
- Pass state background check.
- Have computer and internet skills.
- \*Complete New Volunteer Training including attending an orientation webinar, completing on-line training modules achieving 80% accuracy in the first two attempts, and attending the three day new volunteer training in the Des Moines area.
- \*Shadow an experienced SHIIP Volunteer Counselor for a minimum of three individual counseling sessions (observing the first two sessions and counseling with the support of experienced counselor for the third counseling session).
- \*Sign the Volunteer Agreement.
- \*Commit to twelve months as a SHIIP Volunteer Counselor.
- Conduct one-on-one counseling at assigned SHIIP Sponsor Site.
- \*\*Attend three update trainings each year (minimum of two must be attended in person, one can be made up). Credit for make-up requires 85% accuracy with the online make-up activity.
- \*\*Complete a certification review exercise each year, 85% accuracy is required.
- \*\*Report a minimum of 60 individual client contacts the first calendar year after being trained. Report a minimum of 30 client contacts the year trained.
- Complete client contact reports in SHIIP Tools in a timely manner.
- Complete event reports for presentations, exhibits, fairs, media, enrollment events, etc. in SHIIP Tools in a timely manner.
- Complete reports on other SHIIP activity in the Activity Log on SHIIP Tools.
- Have access to e-mail and internet to receive SHIIP communications in a timely manner.
- Assist sponsor site coordinator with local site promotion and volunteer recruitment.
- Cannot endorse or recommend an insurance company, policy or agent.
- Cannot be active in selling insurance or have any potential financial gain from being a SHIIP volunteer.

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\*New volunteer certification requirement

\*\*Annual recertification requirement