



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.
- *During the first year after training, new counselors must complete three additional training units on: Medicare Claims and Appeals; Medicare Savings Programs Application Process; and Part D Extra Help Online Applications.
- **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 30 individual client contacts each year.
- 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.
- **MUST ALWAYS KEEP ALL CLIENT INFORMATION CONFIDENTIAL!**

*New volunteer certification requirement

**Annual recertification requirement



SENIOR HEALTH INSURANCE INFORMATION PROGRAM SHIIP VOLUNTEER APPLICATION

Name: _____ Date of Birth: _____

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?

COUNSELOR VOLUNTEERS ONLY:

Would you be interested in doing presentations? Yes No

Please list your speaking experience:

SHIIP OFFICE USE ONLY:

Sponsor Site: _____

Region #: _____