

Volunteer Medicare Counselor Job Description

Program Objective:

The Vintage SHIP Medicare Counseling Program serves Medicare beneficiaries helping them access the health coverage for them. Through education, counseling, problem solving, and advocacy, the program seeks to empower people to better understand how to get optimal health care coverage and assist them when Medicare-related problems arise.

Benefits:

If you are looking to give back to the older adults in your community this is a wonderful position for you. This position is socially rewarding and gives many of our volunteer's purpose. There are no material benefits associated with this opportunity, but there is great personal satisfaction. Many community members report high rates of satisfaction and appreciation for the services they receive from our program.

We help navigate the complexities of Medicare with clients who feel they have nowhere else to turn. Whether you love to solve complex puzzles, or translate complex concepts for straightforward consumption, or provide empathy to community member needing assistance, there are indeed rewards!

Specific Responsibilities:

- Respond directly to beneficiaries via phone, email, or face to face meetings, to provide impartial Medicare information. Such information may include, but is not limited to, enrollment periods, original Medicare, Medigap, Advantage plans, and details on a variety of topics related to Medicare.
- Gather information from appropriate sources needed to help consumers solve Medicare related issues.
- Positively interact with local, state, and federal agencies to research answers to consumer's questions.
- Positively interact and feel comfortable working with diverse populations. Clearly communicate with other counselors, acting as part of a team.
- Always maintain beneficiaries' privacy and personal information.
- Attend regular meetings and special volunteer trainings.
- Follow verbal and written instructions and established procedures to clearly and accurately document appointments with beneficiaries.
- Collect information from beneficiaries and submit Client intake forms in a timely matter.
- Establish and maintain boundaries with clients. Provide education and assistance only with Medicare issues and use appropriate referrals to other professionals for unrelated problems. Remember, you are not a case manager.

Time and Place

We empower our volunteers to make their own schedule that works best for them. Because of COVID-19, we encourage volunteers to work from home. Volunteer counselors are the backbone of the Medicare Annual Open Enrollment period which takes place in between October 15 through December 7. Hours may increase, and locations will like vary during this time.

Minimum Qualifications:

- Minimum 21 years of age
- Ability to understand and organize complex information and communicate it clearly to a range of people with varying ranges of healthcare literacy.
- Good written and verbal communication skills are required
- Computer skills: familiarity with email and internet searches.
- Ability to complete SHIP training, SHIP certification, and ongoing education.
- Ability to show empathy yet use discretion with beneficiary information.
- Good time management skills.
- Able to pass criminal background check.

Training Provided:

Volunteer counselors must first pass a criminal background check. Followed by completion of training parts 1 and 2 on the TA SHIP site. After the first two training modules, the volunteer will shadow experienced counselors to gain more knowledge. Once the volunteer has completed the shadowing, the volunteer will take the remainder of the web-based training for SHIP. The time frame for most of the training is approximately 3 months.

Volunteer counselors must pass SHIP training and certification prior to counseling with Medicare beneficiaries. Ongoing online webinars and trainings are available throughout the year. In addition, web-based training materials are available through the TA SHIP and CMS website as new topics may arise.

Supervision:

You will be working directly with the Vintage SHIP Coordinator. If there are subjects you would like more information on, please do not hesitate to bring this up. The Coordinator is more than happy to help get you more resources and training needed.

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