

SHIBA volunteer role description

Medicare counselor

SHIBA mission statement

The Statewide Health Insurance Benefits Advisors (SHIBA) provides free, unbiased information about health care coverage and access to help improve the lives of all Washington state residents. We cultivate community commitment through partnership, service and volunteering.

Purpose

Help accomplish SHIBA's mission by providing individual Medicare counseling.

- Empower, educate and assist Medicare-eligible individuals, their families and caregivers through objective outreach, counseling and training to make informed health insurance decisions that optimize access to care and benefits.
- Educate and assist Medicare beneficiaries, their families and caregivers to prevent, detect and report health care fraud, error and abuse through outreach, counseling and education.

Role duties

This role involves direct confidential, free and unbiased health insurance counseling with Medicare beneficiaries, caregivers and/or family members about their individual situations. Counseling sessions may include a review of personal financial and health information to conduct Medicare eligibility screenings and plan comparisons. Sessions may also include assisting beneficiaries to apply for or enroll in Medicare-related benefit programs.

This role may also involve in-depth, complex interactions with Medicare beneficiaries, caregivers and/or family members who are experiencing issues with obtaining benefits they have already been deemed eligible for. Team members who serve in this role may act on behalf of a beneficiary to correct an error or refer the beneficiary to a supervisor within the SHIBA program or to other agencies.

SHIBA volunteer role description – Medicare counselor

Supervision

Volunteers report to the local program's volunteer coordinator, and, when appropriate, to their SHIBA regional training consultant.

Location

Volunteers work at the offices of the local volunteer host organization and at sites in the community. Volunteers may also be asked to telework as needed.

Counselors provide their services in-person or by phone, email or other electronic format. In-person counseling may take place at locations such as senior centers, libraries or other community sites, but not at beneficiary's homes.

Time commitment

Medicare counselor volunteer schedules are flexible. The local volunteer coordinator works with each volunteer to determine the number of hours the volunteer works each month, and to schedule assignments accordingly. Because of the specialized training Medicare counselors receive, we ask them to commit to a minimum of one year (ideally three), and a minimum of five hours per week or 20 hours per month.

Qualifications

- Good oral communication skills.
- Active listening skills.
- Ability and willingness to learn and share information related to health care benefits which includes preventing, detecting and reporting health care fraud, errors and abuse.
- Ability to explain Medicare coverage and program rules and procedures in terms that beneficiaries can understand.
- Ability to work and get along well with others from diverse backgrounds.
- Ability to request assistance as needed, when the answer to a question is not known by the volunteer.
- Ability to use a computer and access email and the Internet.
- Ability to provide professional and confidential assistance.

SHIBA volunteer role description – Medicare counselor

- Washington state law RCW 42.02.090(5) prohibits our workforce, including volunteers, from being currently affiliated with or employed by a health insurance company, agency or service, or in a position to sell or receive commissions from health insurance products or services. This prohibition includes renewing insurance agent or broker licensing.

Benefits

Medicare counselors receive extensive training on the basics of Medicare benefits, Medicare fraud, errors, abuse and current scams. They also receive training on counseling skills, available local service providers and triage procedures.

All SHIBA volunteers have the satisfaction of participating in a national effort to educate Medicare beneficiaries, their caregivers and the general public about health care benefits and health care fraud, errors and abuse. SHIBA offers volunteer appreciation events to recognize volunteers for their contributions to the program.

Application process

- Complete the volunteer application, including signing a confidentiality agreement.
- Participate in an interview, including reference checks.
- Pass a national-level criminal background check.

Training and certification

- Complete foundational online SHIP TA training (approximately two weeks).
- Complete in-person SHIBA Medicare counselor basic training (approximately six to 10 hours).
- Successfully pass the certification exam.
- Participate in a minimum of 10 hours of Medicare counselor mentoring, and be approved as ready to counsel Medicare beneficiaries.
- Receive a badge and certificate to be able to provide Medicare counseling (after completion of mentoring).

SHIBA volunteer role description – Medicare counselor

- Regular attendance and review of continuing education either in-person or electronically (offered nine times per year).

Evaluation/measures

This activity is measured by the number of counseling sessions the volunteer provides and by an evaluation resource, such as a client feedback form.

