

# SHIBA volunteer role description

## Medicare fraud advisor

### *Senior Medicare Patrol*

#### SHIBA mission statement

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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.

The Senior Medicare Patrol (SMP) mission is to empower and assist Medicare beneficiaries, their families and caregivers to prevent, detect and report health care fraud, errors and abuse through outreach, counseling and education.

#### Purpose

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Help accomplish SHIBA's mission as the Senior Medicare Patrol by providing well-trained advisors who will help:

- Medicare beneficiaries prevent, detect and report health care fraud.
- Preserve the integrity of the Medicare program.

#### Role duties

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This role involves direct confidential, free and unbiased counseling with Medicare beneficiaries, caregivers and/or family members about their individual situations. People in this role may receive referrals from fellow volunteers who suspect they are working with a client who is experiencing Medicare fraud or abuse. They may also act as a Medicare fraud advisor or specialist due to their interest and extensive training in Medicare fraud. Simple or complex fraud counseling may include a review of client's personal information such as Medicare Summary Notices, billing statements and other related financial and health documents.

This role may also involve in-depth, complex interactions with Medicare beneficiaries, caregivers and/or family members who are reporting specific instances of health care fraud, errors and abuse. Team members who serve in this role may act on behalf of a beneficiary to correct an error or refer suspected fraud

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and abuse to the appropriate authorities, including sending documentation to a SHIBA program supervisor to elevate and record in the SIRS database.

The purpose of this role is ***not to investigate suspected fraud***. The purpose is to gather information about suspected fraud and forward it to the central SHIBA staff to enter into the SIRS database or provide further assistance to the client in collaboration with the Medicare fraud advisor. This role ***does enter data into STARS*** and must click on “Send to SMP” so that SHIBA staff can then enter information into SIRS to follow up on the suspected fraud.

### **Supervision**

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Medicare fraud advisors will report to the local SHIBA program volunteer coordinator. They will elevate questions to their regional training consultant, and if appropriate, they will elevate it to the complaints specialist and/or the SMP coordinator.

### **Location**

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Medicare fraud advisors provide services in-person or by phone, email or other electronic format. Advising may take place at senior centers, libraries or other community sites. Advising is not allowed to take place at a beneficiary’s home.

### **Time commitment**

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Medicare fraud advisor schedules are flexible. The volunteer works with the local volunteer coordinator to determine which hours the volunteer will work. The volunteer may wish to set aside time each week or month to handle fraud complaints or conduct fraud outreach and education, work complex interactions or attend national SMP network webinars. If interested, the Medicare fraud advisor can also conduct group outreach and education, such as teaching consumers how to read and understand their Medicare Summary Notices and/or Explanations of Benefits as a primary source for discovering potential fraud.

Due to the specialized training Medicare fraud advisors receive, SHIBA asks 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**

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- Good oral communication skills.
- Active listening skills, including empathy.
- 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.
- Explain Medicare coverage and program rules and procedures in terms that beneficiaries can understand.
- Work and get along well with others from diverse backgrounds.
- Request assistance as needed, when the answer to a question is not known by the volunteer.
- Use a computer and access email and the Internet.
- Provide professional and confidential assistance.
- 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**

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The work of Medicare fraud advisors is extremely rewarding because they are helping people. Volunteers take pride in making an important difference in their communities and knowing that the Medicare program will be protected for future generations.

There is satisfaction in knowing that a volunteer is helping with “ridding the program of waste, fraud and abuse. And for the last 14 years, the Senior Medicare Patrol has been on the front lines of that fight. No one feels more strongly about keeping criminals out of Medicare than seniors themselves.”

### ***Reference:***

US Secretary Health and Human Services, Kathleen Sebelius

For more information, visit: [www.smpresource.org/Content/You-Can-Help/Become-a-Volunteer.aspx](http://www.smpresource.org/Content/You-Can-Help/Become-a-Volunteer.aspx)

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### **Application process**

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- 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**

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The Medicare fraud advisor must first complete all training and certification required to become a certified Medicare advisor and then pass the SMP coursework including:

- SMP Volunteer Foundations
- SMP Counseling
- SMP Complex Interactions
- SMP Group Outreach and Education
- Regular attendance and review of continuing education either in-person or electronically (offered nine times per year)

### **Evaluation/measures**

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This role is measured by the number of counseling sessions the volunteer provides, which is documented in STARS as SMP. Other evaluation resources, such as client or SHIBA staff feedback, may also be used.

