

**Overall Goal and Desired Impact on Community:**

- Education and personalized assistance to Medicare beneficiaries
- Reduction in stress of Medicare beneficiaries concerning their Medicare coverage
- Helping Medicare beneficiaries avoid spending more money than they have to

**Duties and Responsibilities:**

- Work with local SHIP agency to assist individuals who have problems with and questions about Medicare enrollment, benefits, coverage options and claims. This includes the following:
  - Explanation and comparison of Medicare Supplement insurance
  - Explanation, comparison of, and enrollment in Medicare Advantage Plans
  - Explanation, comparison of, and enrollment in Medicare Prescription Drug Plans
  - Explanation of Medicare Parts A and B benefits
  - Referrals to other available services
  - Casework – troubleshooting issues with Medicare (Parts A, B, C, and D), Medigap, employer group coverage, etc.
  - Provide counseling in person at the offices of the local SHIP agency or other community –based public counseling site, and by telephone.
  - Completion of Client Contact and Public and Media Activity Forms on monthly basis.

**Qualifications and Experience:**

- Ability to have Customer Service mind-set: professionalism, tact, courtesy and patience in dealing with individuals from diverse cultural and economic backgrounds
- Ability to navigate the Internet and has access to email
- Good communication skills (written and oral and interpersonal)
- Good organization skills
- Ability to independently resolve problems
- Ability to be impartial
- Adhere to SHIP confidentiality requirements
- No conflict of interest (such as being a licensed insurance agent, or private geriatric care manager)
- Commitment to provisions of SHIP Memorandum of Understanding
- Bi-lingual ability a plus

**Time Requirements:**

- Minimum of 5-10 hours per month counseling clients
- At least one-year commitment to counseling after training completed

**Training Requirements:**

- Completion of training course and 80% passing grade on written evaluation
- Attendance at Update Training held twice a year

**Benefits to Volunteer Counselors:**

- Fulfillment from helping others
- Knowledge gained that is helpful to the community
- Mental Stimulation
- Flexible SHIP work schedule – days of week and times of day
- Camaraderie with other SHIP counselors