



VOLUNTEER COUNSELOR

POSITION GOALS: The SHINE Counselor is an active, direct service, community-based volunteer of the SHINE (Serving Health Insurance Needs of Elders) program to Medicare beneficiaries and others in Florida. The Counselor provides unbiased information and assistance to SHINE clients as a volunteer of the Department of Elder Affairs (DOEA), the Centers for Medicare & Medicaid Services (CMS), and the local Area Agency on Aging (AAA), Aging Resource Center (ARC) or Aging and Disability Resource Center (ADRC) in his or her community.

PREFERRED SKILLS/QUALIFICATIONS:

- Interest in helping people and the local community.
- Customer service mind-set including professionalism, tact and courtesy in dealing with individuals served.
- Strong listening and comprehension skills.
- Basic computer and internet skills. Must maintain a valid individual e-mail address for training and counseling purposes.
- Willingness to work with a culturally diverse volunteer and client population.
- Ability to demonstrate and remain free from any conflict of interest as a counselor.

RESPONSIBILITIES: The counselor works within a local SHINE area to counsel individuals who have problems with and questions about Medicare, Medicaid, Medicare Advantage Plans, Medicare Supplemental Insurance, Prescription Assistance, Long-Term Care Insurance/Planning and other health insurance issues. Specific responsibilities include the following:

- Works to implement the goals of the SHINE program and CMS by providing direct counseling assistance to Medicare beneficiaries;
- Conducts any necessary follow up and research to answer client questions;
- Consistently provides unbiased and free counseling assistance to individuals served by phone, and during one-on-one in-person counseling sessions;
- Handles client information in strictest confidence and in accordance with privacy regulations;
- Provides referrals to appropriate agencies (Department of Children and Families, Social Security Administration, Department of Financial Services, Agency for Healthcare Administration, etc.);
- Accurately completes SHINE client contact and other reporting forms to assure continued funding;
- Attends and completes all required SHINE training, as scheduled by the Department of Elder Affairs;
- Attends all meetings and conference calls with other counselors for local training and CMS updates; and
- Provides suggestions for local community partners, community events, or potential new volunteers to Area or Local Coordinators or the local SHINE Liaison.

VOLUNTEER BENEFITS: Ability to improve the lives of fellow citizens, professional training classes and resource materials, local and statewide volunteer recognition events for active volunteers, mentoring and technical assistance, reimbursement of pre-approved program expenses, eligibility for various recognition items or awards.

TIME COMMITMENT: Sixteen hours per month after completing initial training and mentoring; a two-year commitment to the program overall is requested. The volunteer must accurately report an average of five client contacts per week, as reported in SHIPTalk through one-on-one counseling sessions.

WORK LOCATION: May serve at community or AAA/ARC/ADRC-based counseling sites, by telephone or email, and at enrollment and other community events.

TRAINING REQUIREMENTS: Required to receive and maintain active counselor status:

- Attend Volunteer Orientation Presentation provided by local program;
- Three-day Basic Training, Section 1 in Medicare counseling;
- Successful completion of Basic Training Exam with score of 80% or higher
- Successful completion of a Level II Background Check;
- Six mentoring sessions with a seasoned volunteer;
- Routine local trainings and meetings;
- Annual training conference;
- NPR (National Performance Reporting) Training;
- Presentation Skills training (optional); and
- Long-Term Care Counseling Specialist training (optional).

REPORTING RELATIONSHIPS: Local volunteer leaders (Area Coordinator [AC] and/or Local Coordinator [LC]) provide information updates, support and technical assistance, and counseling assignments. ARC/ADRC SHINE Liaison is the local program and volunteer manager providing guidance and supervision in coordination with volunteer leaders.

METHOD AND PROCESS OF APPOINTMENT: The AC, LC, and Liaison recruit and screen potential counselors. DOEA staff determines suitability and approves counselors for ACTIVE status based on satisfactory completion of required training, mentoring, paperwork, and background screening. Volunteer counselors will remain INACTIVE until all new counselor requirements have been met. During this time volunteers may shadow and assist ACTIVE volunteer counselors in activities not involving direct client contact.

PERFORMANCE EVALUATION: Local and Area Coordinators may periodically assess counselor performance. The LC may recommend further training or provide guidance regarding counselor roles and responsibilities. The Counselor may request additional training or assistance in resolving client issues. Release from participation will be consistent with *Policies III.H and III.O*, Florida Department of Elder Affairs, *Policies and Procedures for Volunteer Service* manual.

RESOURCES AVAILABLE: Technical assistance and information updates affecting Medicare, Medicaid, Prescription Assistance, Long-Term Care, other health insurance, and volunteer roles and responsibilities. Experienced volunteers and staff at DOEA are available to research complicated cases. All *pre-approved* expenses for volunteer travel or materials and supplies are reimbursable in accordance with state policy, and will be submitted to the Liaison for payment consistent with the current contract.

Volunteer responsibilities are consistent with the scope of the Vision, Mission and Values of the Department of Elder Affairs. Volunteers are defined in *Chapter 110.501, Florida Statutes*. Funding is provided through the Centers for Medicare & Medicaid Services (CMS).