



## HICAP VOLUNTEER MEDICARE COUNSELOR JOB DESCRIPTION

SAN DIEGO / IMPERIAL COUNTIES

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### **JOB SUMMARY**

The HICAP Counselor, under the supervision of the Program Manager and the Coordinator of Volunteers, counsels Medicare beneficiary clients, provides information to seniors, and advocates on behalf of seniors. All of these activities are related to the following HICAP objectives:

- Inform the public and all interested parties about the issues associated with Medicare and private health insurance
- Assist Medicare beneficiaries with health claims and insurance problems through direct counseling and informal advocacy
- Support the independence of people making choices that affect their health and financial well-being

### **SPECIFIC DUTIES**

**COUNSELING:** Provide individual counseling and informational services to Medicare beneficiaries regarding Medicare billing claims and problems, Medicare supplement insurance, Medicare Advantage plans, Medicare Prescription Drug Plans, long-term care insurance, and other private health insurance.

**ADVOCACY:** Assist individuals as appropriate, to ensure that clients' rights and privileges under Medicare and other applicable federal and California law or regulation are upheld, make appropriate referrals to legal services and/or other agencies, and other interventions as needed and appropriate.

**RECORD KEEPING:** Maintain accurate records of all client contacts and services provided, and submit monthly reports and other data/information as requested by the Program Manager.

**COMMUNITY EDUCATION (optional):** Make presentations to community groups regarding Medicare, Medigap insurance, Medicare managed care plans, long-term care insurance and consumer rights.

**PROGRAM PUBLICITY AND PROMOTION (optional):** Provide information regarding the Program and HICAP services, including volunteer opportunities, to community groups, senior centers, senior lunch sites, etc.

## **SPECIFIC REQUIREMENTS**

**SERVICE LOCATIONS:** The HICAP Counselor may provide HICAP services from a designated or approved HICAP service site, such as a hospital, Social Security Office, Community Service Center, Senior Center, etc., or on occasion a client's home when the client is homebound. The counselor may also provide service by telephone when appropriate.

**CONFIDENTIALITY:** The protection of a client's right to privacy is of paramount importance to HICAP. All counselors must abide by a contract that assures client confidentiality and must comply with the Program's confidentiality and conflict of interest directives.

**TIME COMMITMENT:** A monthly minimum of eight (8) service hours and attendance at a monthly continuing education meeting for three (3) hours. (*Note: A counselor must provide a minimum of 40 hours of service in a 12 month period in order to maintain his/her registered status*). All counselors also must attend a minimum of 12 continuing education hours in a 12-month period.

## **QUALIFICATIONS**

- Interest in people and in assisting people to be more independent
- Interest and aptitude in the area of Medicare, health insurance, and senior issues
- Ability to communicate effectively
- Ability to clearly document details and information on forms and to summarize case scenarios
- Ability and willingness to comply with all policies and procedures established by the local HICAP and the State HICAP office
- Ability to be objective and unbiased
- Ability to (1) provide counseling and information which will assist clients to make informed choices, and (2) refrain from recommending health insurance plans to clients
- Basic computer proficiency with email, Google search, accessing cloud documents, and ability/technology to participate in remote video conference meetings

**NOTE: Generally, persons who are employed may not be accepted as volunteer counselors as they must be able to make appointments at specific dates and times during regular business hours.**

**MAJOR RESTRICTION: Individuals who sell insurance, or who receive gifts, compensation, or other financial gain from insurers will not be considered for HICAP Counselor positions.**