



HICAP VOLUNTEER MEDICARE COUNSELOR JOB DESCRIPTION

SAN DIEGO / IMPERIAL COUNTIES

JOB SUMMARY

The Volunteer HICAP Counselor works under the supervision of the Volunteer Coordinator. Volunteers counsel and advocate on behalf of Medicare beneficiaries to:

- Inform beneficiaries about issues associated with Medicare and related health insurance
- Assist beneficiaries with health claims and insurance problems through 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 supplement insurance, Medicare Advantage plans, Medicare Prescription Drug Plans, dual eligible Medicare and Medi-Cal choices, and Medicare billing claims and problems.

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

RECORD KEEPING: Maintain accurate and timely records in an online database for all client contacts and services provided.

LONG TERM CARE INSURANCE COUNSELING (*optional*): Complete additional training to be registered to counsel on Long Term Care Insurance options and policies.

COMMUNITY EDUCATION (*optional*): Make presentations to community groups regarding Medicare and related insurance.

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 Senior Center, Social Security Office, Community Service Center, etc. 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 twelve (12) service hours and attendance at a monthly or quarterly continuing education meeting for a total of at least twelve (12), and up to twenty four (24), continuing education hours annually.

QUALIFICATIONS

- Interest in people and in assisting people to be more independent
- Interest and aptitude in Medicare, health insurance, and senior issues
- Ability to communicate effectively to people with low literacy levels
- Ability to clearly document details and information in online forms
- 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
- 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 good candidates 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.