



SHIIP-SMP VOLUNTEER COUNSELOR REQUIREMENTS

Description

Provide one-on-one assistance to help Medicare beneficiaries, their caregivers or representatives with questions and problems related to Medicare & related health insurances. Counselors also assist their sponsor site to create awareness of SHIIP/SMP services in the county; for example, informal discussions with partners or group presentations.

Requirements:

- Be 21 years of age or older.
- Pass federal criminal background check (grant requirement).
- New Volunteer Certification:
 - Complete virtual New Volunteer Training consisting of online modules and attending online classes.
 - Shadow an experienced SHIIP/SMP Volunteer Counselor to observe counseling sessions and learn online reporting requirements.
 - Complete a minimum of 30 client contacts in initial training year.
 - Commit to an initial twelve months as a SHIIP/SMP Volunteer Counselor.
- Annual Recertification:
 - Attend two update trainings each year.
 - Complete the on-line certification review, 85% accuracy is required.
 - Report a minimum of 60 individual client contacts each year (the 2020 average was 148).
 - Complete additional online training modules as required.
- Conduct one-on-one counseling with SHIIP/ SMP clients.
- Complete reporting requirements in a timely manner.
- Adhere to SHIIP/SMP Policies and Procedures, including maintaining confidentiality of all client information.
- Have access to e-mail and internet, and a working computer.
- Assist sponsor site coordinator with local site promotion, and volunteer recruitment.
- Refrain from endorsing or recommending any insurance company, policy or agent.
- Additional availability to serve SHIIP/ SMP clients during the fall Medicare open enrollment period.
- Willing to serve all clients, regardless of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status.
- Licensed or active insurance agents and financial planners and their spouses are excluded from being SHIIP/ SMP volunteers.