



SENIOR HEALTH INSURANCE INFORMATION PROGRAM 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 New Volunteer Training including: completing on-line training modules; completing module reviews with 80% accuracy and attend the three day new volunteer training in the Des Moines area.
 - Shadow an experienced SHIIP/SMP Volunteer Counselor for a minimum of three individual counseling sessions (observing the first two sessions and counseling with the support of experienced counselor for the third counseling session).
 - During the first year after training, new counselors must complete additional training units on: Senior Medicare Patrol (SMP); SHIIP/SMP Policies and Procedures; and Medicaid LIS/MSP.
 - Complete a minimum of 30 client contacts in initial training year.
 - Commit to twelve months as a SHIIP/SMP Volunteer Counselor.
 - Annual recertification:
 - Attend three update trainings each year (minimum of two must be attended in person, one can be made up). Credit for make-up requires 85% accuracy with the online make-up.
 - Complete the on-line certification review, 85% accuracy is required.
 - Report a minimum of 60 individual client contacts each year (the 2018 average was 158).
 - Conduct one-on-one counseling at assigned SHIIP/SMP Sponsor Site.
 - Complete client contacts, event and activity reports in SHIIP/SMP Tools in a timely manner.
 - Adhere to SHIIP/SMP Policies and Procedures.
 - Have access to e-mail and internet to receive SHIIP/SMP communications in a timely manner.
 - Assist sponsor site coordinator with local site promotion, and volunteer recruitment.
 - Cannot endorse or recommend an insurance company, policy or agent.
 - **The SHIP grant prohibits staff and volunteers from having a conflict of interest with the work that is done by SHIPs. Specifically, insurance agents and financial planners and their spouses are excluded from being SHIP volunteers. This includes individuals receiving residual commissions.**
 - **MUST ALWAYS KEEP ALL CLIENT INFORMATION CONFIDENTIAL!**
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