



SHINE (SERVING HEALTH INSURANCE NEEDS OF ELDERS)
VOLUNTEER COUNSELOR

POSITION GOALS: The SHINE Counselor is an active, direct service, community-based representative 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 representative of the Department of Elder Affairs (DOEA), the Centers for Medicare and Medicaid Services (CMS), and the local Aging Resource Center (ARC) or Aging and Disability Resource Center (ADRC) in their community.

PREFERRED SKILLS/QUALIFICATIONS:

- Interest in helping people and your 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.
- 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 Centers for Medicare and Medicaid Services by providing direct counseling assistance to Medicare beneficiaries;
- May serve at community or Aging Resource Center based counseling site, by telephone or email, through home visits, and at enrollment and other community events;
- Conducts any necessary follow up and research to answer client questions;
- Consistently provides unbiased and free counseling assistance to individuals served;
- Handles client information in strictest confidence and in accordance with privacy regulations;
- Provides referrals to appropriate agencies (Department of Children and Families, Social Security, 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 meetings and conference calls with other counselors for local training and the Centers for Medicare and Medicaid Services updates; and
- Makes presentations to community groups if the counselor chooses to complete the Presentation Skills training, and would like this opportunity.

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: Minimum of 5 client contacts per week (average) after completing initial training and mentoring; request a two-year commitment to the program overall.

WORK LOCATION: Community-based counseling sites, telephone counseling, training sites at Aging Resource Center/SHINE Offices, and client homes, as needed.

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

- Attend Volunteer Orientation Presentation provided by local program;
- 3-day Basic Training, Section 1 in Medicare counseling;
- Complete required Internet posted, self-study training courses;
- 2-day Basic Training, Section 2;
- Routine local trainings, quarterly or monthly;
- Annual training conference;
- Presentation Skills training (optional);
- 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 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.

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.

I hereby volunteer my services as described above and agree to remain unbiased in my counseling activities. I understand the role and responsibilities of my volunteer position and agree to conduct myself within my role as a SHINE volunteer counselor. I understand that I may resign or the Department of Elder Affairs may release me from my volunteer position at any time.

Counselor Signature

Date Signed

Area Coordinator/Liaison Signature

Date Signed

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).