



SHIBA VOLUNTEER COUNSELOR POLICIES & JOB DESCRIPTION

The Senior Health Insurance Benefits Assistance program (SHIBA) will provide information and assistance to Medicare beneficiaries through a statewide network of certified counselors. Volunteer counselors will be trained in Medicare Parts A and B, Medicare supplemental insurance (Medigap), Medicare Advantage, Medicare Part D, Medicare Fraud & Abuse; educate about long-term care insurance, and other related issues. Volunteer counselors will work under the supervision of a Volunteer Coordinator, who is appointed by SHIBA's local sponsoring organization. SHIBA assists the department in fulfilling its obligation to protect the insurance-buying public through one-on-one counseling, consumer education, agent education and referral services.

Desired Qualifications and Duties

- No conflicts of interest
- Interpersonal communication, oral and written communication, and organization skills
- Basic computer skills or be willing to learn
- A caring, helpful and respectful attitude
- Successfully complete SHIBA Volunteer Application, screening process, volunteer training and required internship.
- Complete Beneficiary Contact forms for each counseling session using the SHIBA Sponsor's preferred method.
- The ability to remain unbiased about different insurance companies and when giving beneficiaries information about local agents

Services

SHIBA counselors shall provide:

- Confidential, accurate and objective health insurance information and counseling services to the client according to SHIBA guidelines and national SHIP standards.
- Individual assistance at specified sites or by telephone.
- Compare available health and/or drug plans using the Medicare Plan Finder tool on [Medicare.gov](https://www.medicare.gov)
- Assessment of clients' resources and needs related to health care, health insurance, and financial assistance programs.
- Client referral to appropriate resources as needed.

Volunteer Commitment

SHIBA volunteers must:

- Successfully complete SHIBA Volunteer Application, screening process, volunteer training and required internship.
- Sign a SHIBA Confidentiality and Conflict of Interest Statement.
- Complete Beneficiary Contact form via the STARS website.
- Attend SHIBA volunteer meetings.
- Agree to a minimum number of service hours (subject to demand for service).
- Adopt the SHIBA program name and logo.
- Represent SHIBA and its network in a respectful and positive manner.
- Communicate in a courteous, positive, nonjudgmental manner with other counselors, clients, coordinators, and state staff. Views may differ but we do expect discussion to be professional and respectful.
- Media inquiries are referred to the SHIBA Field Officer. Field Officer will work with local Coordinator and state Communications resources.

Ethics and Conflict of Interest

According to the Federal Volunteer Protection Act, SHIBA counselors are protected from civil liability for injuries or damage to the person or property of others, subject to the following general conditions:

- The counselor is working on a state agency task assigned by an authorized agency supervisor.
- The counselor limits her/his actions to the duties assigned.
- The counselor adheres to the duties outlined in the Volunteer Counselor Job Description and these counselor policies.
- The counselor performs assigned tasks in good faith, and does not act recklessly or with the intent to inflict harm to others.