

Title:	Program:	Department:
Part D Open Enrollment Scheduler	SHIP/Medicare Open Enrollment	Resource Center
Volunteer Manager:	Volunteer Manager Contact Info:	Minimum Commitment:
Sue Pileggi, Resources Program Director	spileggi@missoulaagingservices.org 406-728-7682	3 – 6 hours per week Late Sept – Late Nov

Missoula Aging Services' Mission Statement: Missoula Aging Services (MAS) promotes the independence, dignity and health of older adults and those that care for them.

Program Overview: The Montana State Health Insurance Assistance Program (SHIP) is one of many programs offered at Missoula Aging Services. SHIP counselors provide unbiased information to Medicare Beneficiaries and their families or caregivers. The number of people on Medicare continues to grow every day, adding to the over 50 million beneficiaries who receive benefits nationwide. Medicare is a complex system and beneficiaries may have difficulty understanding their benefits and what options are available to them. Our mission is to educate, advocate, counsel and empower people to make informed benefit decisions.

Position Overview: Open Enrollment Scheduler volunteers answer phone calls from people who want to schedule an appointment with a MAS State Health Insurance Program (SHIP) counselor during Medicare Open Enrollment. Medicare Open Enrollment is from October 15 – December 7 every year. Missoula Aging Services begins receiving calls for Open Enrollment appointments in September and the peak period for Open Enrollment calls is from October 1– November 1.

Volunteers collect contact information from older adults, people with disabilities, or their care partners, filling in the appropriate sections of a Medicare Open Enrollment intake form. The Open Enrollment Scheduler then checks staff calendars in Outlook for available appointments and schedules the caller with a SHIP counselor/Resource Specialist. Open Enrollment Schedulers are trained to schedule client appointments into Outlook calendars and will be required to screen clients to ensure they are calling for a Medicare Part D Open Enrollment appointment. If the call is misrouted, and is not a Part D call, the Open Enrollment Scheduler completes a green sheet to pass on the designated staff supervisor. Open Enrollment Schedulers work as part of a team of 14 volunteers.

Key Responsibilities:

- Attend the Volunteer Orientation and a training that includes how to use the MAS phone system and Outlook calendaring software.
- Ability to answer phone calls that come in at varying rates.
- The rate of calls may vary from being very busy to experiencing quiet periods with no calls coming in. Just in case, bring a book.

- Interview beneficiaries, their families, or care partners over the phone to complete information on the Medicare Open Enrollment intake forms.
- Schedule appointments using Outlook calendar ensuring that one or two-person appointments are scheduled appropriately.
- Follow a scripts as trained. Offer callers opportunity to make a donation for the services provided following a script. Offer Open Enrollment classes as an option following a script.
- May refer caller to a SHIP counselor in their county of residence if they do not live in Missoula County.
- Instruct callers to expect an appointment confirmation letter and the need to fax, mail, or drop off their current prescription drug list as soon as possible prior to their appointment.
- Refer clients who have questions for anything other than Medicare Open Enrollment to a Call Center Specialist by transforming them to the MAS call center.
- Provide empathetic understanding and support while collecting the needed information, completing the intake form, and scheduling appointments.
- May call clients to remind them about their scheduled appointment.

Qualifications:

- Must feel comfortable talking to people on the phone and able to explain the process in an empathetic manner.
- Must sign and adhere to terms of confidentiality policy.
- Maintain a high level of professionalism.
- Ability to listen, understand and redirect clients to obtain information.
- Ability to listen empathetically without voicing a personal opinion or preference on current policies or governmental parties.
- Ability to decipher information reported by clients, and translate into correct Medicare terminology.
- Ability to schedule appointments using Microsoft office Outlook calendaring software.
- Able to sit for three hour shift with two 15 minute breaks.
- Sensitivity to the needs of older adults, people with disabilities and their care partners
- Desire to serve with compassion, respect and patience.
- Excellent verbal communication skills.
- Superior telephone etiquette.
- Criminal and Sex Offender background check required.
- Must be 18 years of age or older.

Benefits:

- Join the dynamic team of SHIP volunteers and make a difference in your community by helping people understand their health benefits and options.
- Be part of the solution to help older adults and people with disabilities to save money on their Medicare expenses and have a positive impact on their lives by helping them make an informed choice.
- If enrolled in Medicare have consultation with certified SHIP counselor to compare 2018 Medicare Part D plans.

- Experience professional growth as you learn the intricate details of Medicare and increase personal satisfaction by educating others in your community while meeting new people and having fun!

Support: Volunteers will attend the Volunteer Orientation and training specifically related to using the MAS phone system and Outlook scheduling software. In addition, volunteers receive on the job training and support throughout the duration of the position. Medicare Open Enrollment Schedulers will report directly to the Resource Center Program Director. This position will have regular communication with Resource Center staff to ensure that questions are addressed. This position will also be supported by Missoula Aging Services' Volunteer Coordinator and will receive news and information regarding the agency's Volunteer Program.

Commitment: Mid-September – Late November (Peak: Oct 1st – Nov 1st)

Amount of Time – minimum 3 - 6 hours per week (1-2 shifts per week)

Time of Day – Mornings or afternoons Monday through Friday, Shifts are 8-11am, 11-2pm and/or 2-5pm

Orientation to MAS and Phone / Scheduling Training – Monday, September 18 from 2:00-4:00 p.m. at Missoula Aging Services, 337 Stephens Ave, Main Conference room.

Location: Missoula Aging Services, 337 Stephens Avenue, Missoula, MT 59801

Sustained Outcome: Medicare Open Enrollment Schedulers are an integral part of the Medicare Open Enrollment team. The team of SHIP volunteers assures clients receive the help they need to make informed decisions and save money by choosing the best Medicare health and drug plans that best meets their needs.

For more information, please contact Missoula Aging Services' Volunteer Coordinator at (406)728-7682 or volunteer@missoulaagingservices.org. 07/2017

Signature of Volunteer

Date

Signature of Volunteer Manager

Date