



www.swcaa.org
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PROGRAMS DEPARTMENT CHOICES VOLUNTEER ROLES

The CHOICES program operates with a variety of volunteer roles. Information about the roles and the responsibilities connected with them are set forth in position descriptions. It is important to know that CHOICES volunteers go through a screening process because volunteers have access to beneficiaries or other vulnerable people's protected personal, health care, or financial information. CHOICES volunteer roles include:

- **Administrative support:** This role involves such work as copying, filing, data entry, and placing outbound phone calls in support of CHOICES program activity. Administrative support volunteers do not provide counseling, but may schedule appointments and/or group presentations for CHOICES team members who assist the public through counseling and outreach services.
- **Counselor:** This role involves direct confidential health insurance counseling with Medicare beneficiaries, caregivers, and/or family members about their individual situations and may include a review of personal financial and health information in order to conduct Medicare eligibility screenings and plan comparisons, and to assist beneficiaries with applying for or enrolling in Medicare related benefit programs. This role may also involve in-depth, complex interactions with beneficiaries, caregivers, and/or family members who are experiencing issues with obtaining benefits they have already been deemed eligible for. Team members who serve in this role may act on behalf of a beneficiary to correct an error or refer the beneficiary to other agencies.
- **Open Enrollment Counselor:** This role involves assisting Medicare beneficiaries and their caregivers during the annual Medicare Open Enrollment Period. Open Enrollment Counselors provide assistance with



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plan comparisons and enrollments into Medicare Part D or Medicare Advantage Plans. Counselors may also conduct eligibility screenings and provide application assistance for other Medicare related benefit programs. Team members who serve in this role may act on behalf of a beneficiary to correct an error or refer the beneficiary to other agencies.

- **Outreach Volunteer:** This role involves transporting and disseminating CHOICES educational and informational materials to sites and events, and may include presenting prepared copy or performing scripted activities for small groups. This role may also involve staffing information kiosks or exhibits at events such as health fairs and enrollment events. Outreach volunteers who staff exhibits or enrollment events provide general information about the program to the public and answer basic questions, but do not engage in counseling beneficiaries about their personal information or situations.
- **Presenter:** This role involves giving substantive presentations to small and large groups, with the opportunity for interaction with the audience during time set aside for Q & A and discussion. Volunteers who provide presentations do not provide counseling, but may refer audience members to CHOICES team members who provide health insurance counseling to beneficiaries.