

Medigap Intake Support (LTE)  
Class: Operations Program Associate  
Board on Aging and Long Term Care

#### Position Description

This position will provide supportive assistance to the Medigap Helpline Services programs, in particular with the duties of intake and referral services as well as clerical support. This position will assist in clearing the toll-free helplines, assist with the data entry and counselor assignments, compiling and prepping mail, and will contact consumers with appropriate referral sources. This position will provide invaluable support to the initial contact many consumers have with these programs. Timeliness and accuracy of data reporting are critical to the outcomes reported to the Centers for Medicare and Medicaid Services (CMS) and to the Office of the Commissioner of Insurance (OCI).

This position performs under the general supervision of the Medigap Helpline Services Supervisor.

#### **Time %    Goals/Activities**

**60%    A. Provides Intake support and coordinates requests for Medigap Helpline Services from consumers, family members, and other agencies and organizations.**

- A1. Staff the Medigap Helpline toll-free 800 line Monday – Friday during the agency’s state business hours. Clear the toll-free 800 line of messages, input the calls into the agency database, assign and calls to appropriate counselor.
- A2. Return referral calls in a timely manner, determining requests that are more appropriately handled by other state agencies or those outside state government and refer the caller to such agency.
- A2. Perform general intake tasks. Gather demographics (Name, age, phone number and zip code location) and a detailed synopsis of presenting issue. Inform callers of the process to obtaining counseling with the Medigap Helpline Services.
- A3. Strictly observe agency confidentiality policy and appropriate state and federal law.
- A4. Respect the caller’s situation and refer to a counselor if needed.
- A5. Respond to all voice-mail messages, U.S. Postal Service mail inquiries and website requests received overnight, over the weekend or holiday by noon on the next business day, forwarding issues/concerns to the appropriate agency staff.
- A6. Refer any call from a legislator, legislative staff, and congressional staff requesting information regarding available health insurance options for constituents to a counselor. Inform Medigap Helpline Services Supervisor or designee of requests for information and consultation to legislators regarding the Medigap Helpline Services programs.

- A7. Refer all calls from elected officials, state and federal, regarding the Medigap Helpline Program to the Medigap Helpline Services Supervisor or Executive Director.
- A8. Refer all media requests to the Medigap Helpline Supervisor.

**20% B. Manage the Medigap Helpline's Database System.**

- B1. Accurately and timely input caller's information and requests into database system for access to call logs by counselors.
- B2. Identify technical problems within the database and work with the agency Management Information Specialist for problem resolution and implementation of corrections.
- B3. Assist with development of monthly and quarterly program management reports to satisfy requests for program statistics and information.

**10% C. Provide educational and outreach materials to enhance consumer's understanding of insurance products available to them.**

- C1. From caller requests, compile printed material from the Medigap Helpline Publications list and prep for mailing.
- C2. Assist the Intake Advocate in monitoring the written materials inventory of the Medigap Helpline Services programs, and insure the storage area for materials remains well-organized.
- C3. Inform the Intake Advocate if any mailroom materials are out-dated or requires replenishing.

**10% D. Establish and maintain an intake quality assurance program under the direction of the Medigap Helpline Services Supervisor.**

- D1. Provide supportive assistance for the Medigap Part D and Prescription Drug Helpline as needed.
- D2. Perform clerical duties such as copying planfinders for counselors as needed.
- D3. Interact with program Volunteers to complete assigned tasks.
- D4. Other duties as requested.

**Knowledges, Skills, and Abilities:**

- Basic Understanding of the Medicare program and other coverage options surrounding Medicare including: Medicare Supplements, Medicare Advantage plans, medical assistance programs, employer sponsored coverages, and familiarity with private health insurance and long-term care/nursing home insurance.
- Knowledge and skills of modern office practices and procedures.
- Effective oral and written communication skills.
- Proficient in use of Microsoft Outlook, Word, PowerPoint, spreadsheets, and database systems.
- Display the skills and organization ability in working multiple assignments.
- Skills and knowledge of operating multiple phone lines and transferring calls in a high volume setting.
- Understanding and compassion for consumers navigating through the complex information surrounding Medicare.
- Must possess experience with discussing complicated matters over the telephone, especially with older persons or with persons with disabilities.
- Must possess the ability to help the caller clearly state their concerns or issues to better able refer to counselor or other resource.
- Must be able to manage competing responsibilities and set priorities within time constraints.