



Insurance Specialist Job Description

Reports to: Community Engagement Manager

FLSA: Full-Time Non-Exempt

Summary:

Under the supervision of the Community Engagement Manager, the Insurance Specialist will provide assistance to older adults in accessing health insurance and prescription drug coverage, including, but not limited to completing applications for pharmaceutical company patient assistance programs, assisting with Medicaid applications/working with Delaware County Department of Job and Family Services, completing Medicare Part D, Medicare Supplement and Medicare Advantage plan comparisons/assisting with application processes, medical bill organization and client advocacy and education; maintain essential records, and interact with clients.

Essential Job Functions:

Medicare Open Enrollment and Year-Round Medicare Enrollment:

- Document interaction with clients within appropriate guidelines, using resource management software as necessary
- Provide 1:1 insurance counseling via in-person, phone or virtual appointments
- Teach classes, workshops and offer other presentations to the public as assigned

Program Development:

- Participate in on-going education to stay current with changes to benefits, insurance procedures, etc. Education may be done via attending OSHIIP and other relevant trainings, participating in webinars, reading OSHIIP news/updates, reviewing related professional publications, networking with other professionals, and other relevant information sources
- Contribute to insurance education for the public via digital and printed materials, such as video recordings, website information, Facebook Live, MyCommunicator, etc., as requested
- Assist with scheduling Medicare classes and workshops throughout the year, including schedule of instructors, utilizing volunteers when possible
- Assist in the development and quality improvement activities related to the service programs within the scope of the position
- Make recommendations pertaining to Insurance Program policy changes and reports to supervisor any relevant insurance issues
- Assist with orienting, scheduling, and supervising the Insurance Volunteers, including assigning work duties, conducting performance reviews as needed or requested, and ensuring adherence to relevant policies and procedures as assigned
- Advocate for older adults regarding insurance coverage, enrollment or claims

Educational Requirements:

- Minimum of Associates Degree desired; field of study in social service or human service field

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preferred

- OSHIIP trained and certified preferred

Experience Qualifications:

- Experience related to health insurance, public benefits, or other related benefits service preferred. Cannot be a licensed insurance broker or agent or be affiliated with an insurance company in this role.

Knowledge, Skills and Abilities:

- Interact with staff, volunteers, and clients in a professional manner
- Good written communication skills for documentation and writing insurance articles
- Knowledge of Medicare and medical insurance, including Medicare Prescription Drug Coverage, Medicare Supplement Insurance and Medicaid required. Must be OSHIIP trained and certified; training available if not previously trained/certified
- Ability to work with diverse individuals
- Good organizational skills, detail oriented, required
- Strong documentation and clerical skills, including experience working with computers, software programs, filing, and use of various office equipment
- Ability to be creative and to deal with ambiguity and change on a routine basis
- Ability to meet deadlines and successfully handle multiple tasks
- Ability to drive to and from offsite locations, meetings, events, etc. as needed and as assigned
- Ability to work evenings and Saturdays as needed
- Ability to promote a positive work culture both within the organization and in the community

Essential Physical Requirements/Working Conditions:

- Ability to safely navigate uneven terrain, stairs, and move about the building
- Ability to lift 20 lbs. on a regular basis without assistance
- Ability to work extended periods of time at computer/on the phone
- Smoke-free facility

Other:

It is recognized that in any organization, particularly a small organization, it is necessary to assume new responsibilities appropriate to ensure a smooth continuity of operations with the organization. Not only is the Insurance Specialist required to wear many hats, but it is expected that this person will be familiar with the work of others to the point of being able to fill in on a temporary basis. It is also anticipated that the other organizational needs will emerge from time to time which will be assigned to the Insurance Specialist.

Insurance Specialist

Employee Printed Name

Employee Signature

Date

Revised: 12/29/2021