

**DEPARTMENT:** OFFICE FOR THE AGING  
**CLASSIFICATION:** COMPETITIVE  
**APPROVED:** AUGUST 25, 2022

**INSURANCE COUNSELING SPECIALIST (OFA)**

**DISTINGUISHING FEATURES OF THE CLASS:** The position involves responsibility for coordinating a program of health insurance counseling for older adults regarding various government and private programs providing coverage for health benefits, long term care, and related matters. In addition, this position is responsible for developing and carrying out community outreach programming related to general Office for the Aging (OFA) services as well as New York Connects. This position receives and provides training on a routine basis. Does related work as required.

**TYPICAL WORK ACTIVITIES:**

1. Provides insurance counseling services to consumers in accordance with state and federal statutes and regulations, as related to but not limited to, Medicare/Medicaid; Medicare Improvements for Patients and Providers Act (MIPPA); screening for the Medicare Savings Program and Low Income Subsidy as well as EPIC; long term care insurance; private and employee provided health insurance; and retirement plans;
2. Creates and/or orders and maintains appropriate electronic and hard copy resource materials for counselors and others interested in obtaining more information about Health Insurance Information and Assistance Program (HIICAP);
3. Calls insurance companies and providers to resolve billing disputes and claim issues and works through the appeals process with consumers;
4. Makes home visits as necessary as it relates to health insurance counseling;
5. Plans and teaches Medicare 101 classes as well as other related subject material;
6. Ensures that state regulations are followed in regard to programs/services;
7. Recruits, trains, and monitors volunteers who provide insurance counseling services;
8. Attends training required by the state and as offered by other pertinent entities regarding health insurance;
9. Assists in establishing or maintaining contact with persons or organizations in the community that may provide necessary resources for individuals serviced by the agency for insurance related matters;
10. Speaks to community groups, medical practices and organizations to educate them on HIICAP related topics, which may involve evenings and weekends;
11. Assists with outreach activities, including tabling events, related to services of the Office for the Aging;
12. Uses computer database to collect and record client information including demographic, contact, and service provision information;
13. Maintains hard copy client records as needed;
14. Prepares required reports for submission to the state as well as for use by the Advisory Council and as otherwise deemed necessary;
15. Creates advertising pertaining to health insurance counseling for electronic and print media;
16. Assists with social media posts for the Office as well as helping to maintain/update the OFA website;
17. Assists in soliciting consumer satisfaction surveys and providing opportunities for program contributions from clients served;
18. Serves on related coalitions/committees and assists in establishing coalition/committee efforts;
19. Creates articles for the OFA newsletter;
20. Completes bi-weekly time study per state requirements;
21. Collaborates with fiscal staff and the Director on program budget and has input on related expenditures to meet program needs.

**CONTINUED**

## **INSURANCE COUNSELING SPECIALIST (OFA) CONTINUED**

**FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES & PERSONAL CHARACTERISTICS:** Good knowledge of insurance programs, laws, and regulations affecting older adults; good knowledge of local resources; good knowledge of the characteristics, needs, and challenges of older adults; working knowledge of public information and relations techniques; excellent organizational skills; excellent verbal and written communication skills; ability to direct and/or assist consumers to appropriate resources; ability to instruct, facilitate, and lead groups; ability to develop and maintain effective working relationships with others; ability to communicate clearly and effectively verbally and in writing; ability to supervise the work of the volunteers; ability to use a personal computer and modern office software to enter data and produce reports at an acceptable rate of speed and accuracy; ability to utilize social media and to learn new programs; ability to maintain record and prepare reports; tact; courtesy; integrity; sound professional judgment; physical condition commensurate with the demands of the position.

**MINIMUM QUALIFICATIONS:** Candidates must meet one of the following:

1. Graduation with an Associate's Degree or higher **AND** one (1) year of paid experience in a human services position or in a position that involved explaining health insurance programs; **OR**
2. Graduation from high school or possession of an equivalency diploma **AND** three (3) years of paid experience in a human services position or in a position that involved explaining health insurance programs.

**NOTE:**

1. Verifiable part-time experience will be pro-rated.
2. Degrees must have been awarded by a college or university accredited by a regional, national, or specialized agency recognized as an accrediting agency by the U.S. Department of Education/U.S. Secretary of Education.

**SPECIAL REQUIREMENT:**

1. Possession of a valid New York State Driver's license at time of appointment and for the duration of employment;
2. Must become a certified HIICAP counselor within six (6) months of appointment and maintain certification for the duration of employment.