# JOB DESCRIPTION

PROGRAM: **STEP Office of Aging**

JOB TITLE: **PA MEDI Coordinator**

PAY GRADE: **8**

## JOB SUMMARY

PA MEDI is a no cost health insurance counseling program designed to assist eligible Pennsylvanians with Medicare, Medicaid, and Community Health Choices. This position recruits, screens, trains, and schedules volunteers for the Office of Aging's PA MEDI Program. The position provides overall leadership, guidance, and direction to the PA MEDI volunteer counselors working in the Program in Lycoming and Clinton Counties. This position performs filing, copying, and mailing as well as performing general office and clerical operations. Enters and retrieves information from a networked computer environment utilizing documents, databases, and spreadsheets. Provides information and referral services to consumers by telephone and in the office. Position delivers services under STEP's Independent Living Pathway to Success.

## SUPERVISORY RELATIONSHIPS

**SUPERVISES:** Volunteers for PA MEDI Program
**REPORTS TO:** Office of Aging Director

## ESSENTIAL QUALIFICATIONS

- ❒ Associate's degree specializing in healthcare, business, or office administration, or a related field; Bachelor's degree preferred;
- ❒ Two years of experience in a community service organization or business or experience with health insurance; and,
- ❒ Strong communication skills including listening, understanding, informing, and speaking; amiable disposition and ability to remain professional when dealing with telephone callers or visitors.

## GENERAL REQUIREMENTS

- ❒ Valid driver's license and reliable transportation with appropriate insurance coverage available daily;
- ❒ Pennsylvania State Police Criminal History Clearance, Child Abuse Clearance, FBI Clearance, and National Sex Offender Registry check current within 90 days of employment; and Motor Vehicle Record check;
- ❒ One year of experience with both operating personal computer hardware within a networked environment and Microsoft Office products; and,
- ❒ Clear speaking voice and the mental and physical ability to perform essential job functions with or without any health restrictions, including the ability to sit, stand, climb stairs, and safely lift and carry up to twenty pounds unassisted, have unrestricted use of the upper body, and corrected or uncorrected hearing and vision within normal ranges, and the ability to access handicapped-inaccessible residences.

## SPECIAL REQUIREMENT

- ❒ Achievement of PA MEDI Counseling Certification within the initial employment period and maintenance of certification throughout employment; and,
- ❒ Become protective service report of need intake certified.

## SPECIFIC DUTIES

- Recruits, trains, and schedules volunteers for the PA MEDI Program;
- Acts as technical assistance resource for volunteer PA MEDI Counselors;
- Manages ongoing activities of the PA MEDI Counselors after the initial training through direct supervision and frequent communication;
- Forges partnerships with local community organizations/agencies/providers to increase awareness about PA MEDI and to expand referral sites;
- Maintains communication with state appointed regional staff to address local program issues/concerns;
- Attends mandatory PA MEDI trainings, webinars, and meetings (e.g., annual conference);
- Provides counselors with information necessary to counsel; places PA MEDI Counselors at community sites that are accessible to Medicare users, and designates a Lead Counselor/Volunteer for each county of the PSA;
- Ensures the scheduled Medicare Part D enrollment events are posted in a timely fashion on the PA Department of Aging website within weeks of the start of the Annual Enrollment Period (AEP);
- Provides PA MEDI and Medicare counseling to beneficiaries, as needed;
- Monitors Counselor activities by reviewing all forms and reports;
- Reviews and consolidates data, as necessary, to prepare reports;
- Completes or oversees completion of all data entry and reports required by the Department of Aging;
- Promotes and coordinates programs of publicity and outreach to include speakers, presentations, advertising, and educational awareness programs;
- Organizes bimonthly meetings for all PA MEDI volunteers to discuss activities, changes in Medicare, and other related matters;
- Attends all trainings, update meetings, and other trainings related to PA MEDI throughout the year;
- Oversees ordering PA MEDI brochures for all offices and assures their proper distribution;
- Participates in Department of Aging trainings and meetings, as required;
- Complies with applicable federal, state, and local laws, regulations, and directives, as well as agency policies and procedures;
- Collects and inputs data, perform data queries, and electronically transmits data;
- Generates reports in Aging databases for STEP, Inc., the Aging program, and the Pennsylvania Department of Aging, as assigned;
- Complies with program and agency reporting requirements;
- Provides comprehensive office and clerical support to STEP Office of Aging;
- Prepares items for mailing and distributes mail, as assigned;
- Performs filing and works in cooperation with the administrative staff in maintaining electronic records and database;
- Uses a personal computer or when appropriate, an electric typewriter; types a wide variety of material, as instructed; proofreads and corrects material as necessary;
- Operates office machines;
- Performs receptionist duties by answering the phone and greeting walk-in consumers, as needed; participates in office/phone coverage;
- As needed, has face-to-face and phone contact with elderly individuals to explain services, screen for needs, and make referrals for Office of Aging services or other resources such as, but not limited to, Social Security, County Assistance Office, and public housing;
- As needed, completes necessary forms to obtain Office of Aging services and completes or

aids in completing forms for other services and benefits such as, but not limited to, Medicare, rent rebate, PACE, and Department of Public Welfare (DPW) Programs;
- ❖ Provides consumers with the opportunity to donate for services rendered;
- ❖ Attends training sessions as assigned and shares information with staff, as assigned;
- ❖ Implements all Pennsylvania Department of Aging Directives and all STEP and Program policies and procedures, as they apply;
- ❖ Maintain confidentiality at all times; and,
- ❖ Performs related work as required.

## REQUIRED KNOWLEDGE, SKILLS & ABILITIES

- ❖ Knowledge of the following:
  - Medicare, Medicaid, and other insurance products;
  - Geographic area served;
  - Needs and problems of those persons aged 60 and over;
  - Individual and group behaviors, and ways of working effectively with the elderly;
  - Basic principles and methods of program interpretation and community organization;
  - Effective customer service principles;
  - Services and organization of the STEP Office of Aging;
  - English grammar, spelling, and punctuation;
  - Standard office procedures, practices, conduct, and action necessary in maintaining harmonious working relationships;
  - Type, organization, and use of standard office files, logs, forms, and letter formats;
  - Microsoft Office Suite including, but not limited to, Microsoft Word, Outlook, Excel, and Publisher components;
  - Current economic, social, and health problems of the elderly and disabled; and,
  - Mental health conditions and dementias that afflict the elderly.
- ❖ Skill in the following:
  - Techniques of supervision and basic management of volunteers;
  - Communication, such as, speaking, listening, and interviewing, to express ideas clearly and to interact effectively with customers, coworkers, management, outside agencies, and the public;
  - Using a computer system, keyboard, mouse, printer, and the operation of software;
  - Using and routing electronic mail and correspondence, using the Internet for information mining, computer navigation, and document management; and,
  - Processing and organizing various types of data and information into both written and electronic formats.
- ❖ Ability to perform the following:
  - Clearly articulate Medicare and other insurance options to beneficiaries;
  - Clearly express ideas orally and in writing, and effectively interact with agency volunteers, consumers, co-workers, management outside of agency, and the public;
  - Plan and direct the work of volunteers;
  - Prepare and maintain written and electronic records;
  - Plan, organize, and direct programs to community groups and volunteer trainings;
  - Do arithmetic calculations sufficient to assist consumers with insurance issues;
  - Establish and maintain effective working relationships with coworkers, consumers, various clubs, community organizations, and the public;
  - Project a positive and professional image;

- Perform and maintain daily recordkeeping functions and prepare required reports as requested;
- Demonstrate respect for individuals and groups with varied cultural, racial, ethnic, religious, and linguistic identities or backgrounds;
- Understand and accept the needs and rights of others, and effectively communicate with customers;
- Understand and follow oral and/or written instructions, some of which may include multifaceted procedures, and work independently of direct supervision;
- Understand problems of customers and exercise sound judgement in appraising needs of customers and directing them to appropriate services to meet their needs;
- Collect, organize, and process information for requested reports;
- Proofread information for conformance with instructions or for compliance to specific administrative or procedural rules;
- Organize and prioritize work, and develop effective work methods in an area which involves variable phases or different techniques and procedures; and,
- Maintain confidentiality at all times.