Board on Aging and Long Term Care
Medigap Helpline
Position Title: Medigap Helpline Services Supervisor
Classification: Long Term Care Services Supervisor

Position Summary

Under the general supervision of the Medigap Helpline Services Director, this position operates independently and with delegated first-line supervisory authority:

1) Supervises the Medigap Counselors and Part D Helpline Counselors.
2) Maintains Medigap Helpline program counseling services to ensure high-quality services for program clients and partners.
3) Provides training, information, and technical assistance to staff, volunteers, clients, and professionals regarding Medicare, Medicaid, long-term care insurance and related insurance products and relevant state and federal codes and regulations.
4) Manages day-to-day Medigap Helpline program activities including call triage, data management, complaints, outreach, database and records management and any agency directives as delegated by the Medigap Helpline Services Director.
5) Implements policies and procedures established by the Medigap Director; recommends operational procedures; and implements quality monitoring and program improvements.
6) Assists the Medigap Director in compiling and submitting data for biennial reports, budget planning, budget reports, grant reporting, and other information requests.
7) Prepares public facing informational materials and monitors the program's website content at the direction and with the approval of the Medigap Helpline Services Director.
8) Provides expertise on all state and federal statutes and regulations relating to Medicare, health insurance and long-term care finance, including but not limited to Title XVIII Medicare, Title XIX Medical Assistance Program, Social Security and the Older Americans Act.
9) Assists the Medigap Helpline Services Director with press releases, public testimony, or public comments on proposed regulations or legislation, as directed.

This position requires licensure or obtaining licensure by the Commissioner of Insurance as an Insurance Intermediary with an emphasis on health and accident and life insurance and certification as required by the State Health Insurance Program (SHIP) within the first 2 years of employment. This position necessitates maintaining compliance with all continuing education requirements of licensure and certifications.

Goals and Worker Activities

45% A. Management, Supervision, and Leadership of Medigap Helpline and Prescription Drug Part D Counselors

A1. Prepare position descriptions of Medigap staff, develop any information necessary for certification or Requests to Staff (RTS), lead the recruitment and interview process and make recommendations to hire prospective staff members this position supervises.

A2. Plan, organize, and coordinate a comprehensive orientation and training program for Medigap staff, consistent with training standards established by the Medigap Director.

A3. Assess, plan, organize and coordinate regular training of staff supervised to ensure skills are maintained, with an emphasis on training on new and/or updated information in a timely manner.

A4. Recommend external, continuing education and other training opportunities to assist staff in performing duties and meeting any licensure or certification requirements. Evaluate and approve employee training requests for consistency with program goals, employee licensing and credentialing requirements and workload.

A5. Assign and/or reassign employees work in a manner consistent with each employee's classification level to achieve balanced workloads and promote achievement of the agency's goals and mission.

A6. Develop, implement, monitor, and evaluate performance standards of employees supervised emphasizing quality assessment and improvement.

A7. Regularly monitor the work product of staff supervised through the Medigap database and reviews to ensure work performance coincides with assigned tasks and goals. Review written reports and counselor database entries. Monitor outreach activities and approve requests.

A8. Conduct performance reviews with probationary staff at least every six months and with permanent staff on an annual basis to ensure work performance coincides with agreed upon objectives and goals.

A9. Assist Medigap counselors with direct counseling cases as requested and when appropriate.

A10. Provide information and technical assistance to each Medigap staff member regarding state and federal codes and regulations.

A11. Recommend to Medigap Director appropriate courses of disciplinary action for subordinate employees when warranted.

A12. Manage disciplinary concerns with the support and assistance of Human Resource/Division of Personnel Management and in consultation with the Medigap Director.

A13. Approve leave requests of employees supervised for holidays, personal days, vacation and use of compensatory time, according to agency procedures and guidelines. Approve expense reports and travel requests.

A14. Provide direction and oversight of the insurance licensing process and SHIP certification for new Medigap staff hired as counselors in accordance with standards set by the Medigap Director.

A15. Assist employees supervised with records retention and management duties. Assist direct reports with database documentation guidance and troubleshooting. Ensure confidentiality of records is always maintained. Assist employees, in coordination with the Office Manager, for proper disposition of confidential records.

A16. Manage daily Medigap Helpline counseling operations, including triage protocols, scheduling and coverage planning, to ensure consistent, timely, and high-quality counseling services for program clients.

15% B. Performance of Program Operations, Quality Monitoring and Administrative Support

B1. Assist the Medigap Director with the annual review and update of program policies; identify operational impacts of changes in state and federal regulations or statutes and recommend new or revised procedures.

B2. Support the Medigap Director in developing and preparing for special projects, and execute all assignments as directed. Special projects could include but are not limited to technical papers, program or evaluation reports, media or communications, educational materials, and grant planning.

B3. Coordinate, with the advice of the Medigap Helpline Director and Counsel to the Board, any necessary communication or responses to complaints or concerns from the public, commercial insurance providers, regulatory agencies, or government officials.

B4. Maintain accuracy and integrity of the Medigap database and produce operational data reports for the Medigap Director to support analysis of trends, patterns and issues affecting Medicare beneficiaries.

B5. Maintain up to date program information on agency website in coordination with the Medigap Director. Assist staff with development and review of consumer publications, press releases, brochures, and educational materials.

15% C. Management of Medigap Helpline Volunteer Program

C1. Ensure implementation of volunteer program standards set by the Medigap Director and coordinates with the Lead and counseling staff on day-to-day volunteer operations.

C2. Develop and implement with the approval of the Medigap Director recruitment strategies, training materials, and policies related to the Medigap Helpline Volunteer Program.

C3. Coordinates with the assistance of lead counselor staff the review of intial inquiries, applications, and onboarding of Medigap Helpline volunteers.

C4. Assists and providers the lead counselor staff with direction on the submission of volunteer conflict of interest, background check, and other necessary pre-onboarding forms and policy submission.

10% D. Interpretation of Medicare, Health Insurance, and Long-Term Care Regulatory Requirements in Support of Program Operations.

D1. Interpret and explain Medicare, health insurance and long-term care regulatory requirements and responsibilities to agency staff and outside professionals and to meet the needs and interests of such organizations.

D2. Bring all unresolved complaints against a government regulatory or reimbursement agency to the attention of the Medigap Director with recommendations for resolution.

10% E. Coordination of Program Operations Between Supervised Staff, the Agency, the Public and Partner Agencies.

E1. Ensure the accuracy, reliability and timeliness of program data supporting the federal reports submitted by the Medigap Director.

E2. Serve on intergovernmental committees, taskforces, workgroups and other public and private groups as assigned by the Medigap Director.

E3. Answer routine inquiries from the public and partner agencies; refer inquiries from state and federal legislators or executive branch officials to the Medigap Director.

E4. Review complaints or inquiries from the public regarding the status of cases or actions taken to resolve cases. Prepare written or verbal responses as appropriate.

E5. Prepare facts and background information for Medigap Director use in presentations to public bodies or other organizations.

E6. Provide media statements or interviews as directed by the Medigap Director and in coordination with Legal Counsel when appropriate.

E7. Provide operational data and program status information to the Medigap Director to support the quarterly report to the Board.

E8. Monitor referrals to other agencies by Medigap staff and provide an oral report at least quarterly to the Medigap Director on the disposition.

5% F. Other Duties as Assigned.

F1. Participate, coordinate, and assist with program professional development, skill building, and inclusion activities pursuant to the agency's Recruitment and Retention plan. Support and encourage an inclusive work environment.

F2. Maintain records as required under agency and state records schedules.

F3. Assist Legal Counsel with public records requests and records searches related to the Medigap Helpline.

F4. Additional duties in furtherance of the mission of the program as assigned.

Knowledge, Skills, and Abilities

Technology and Computer Skills:

1. Proficient computer skills including Microsoft Word, PowerPoint, Excel, virtual meetings, OneNote, and SharePoint sites.
2. Experience developing and maintaining SharePoint based webpages. Extensive Experience creating and maintaining public facing webpage materials.
3. Extensive Experience developing internal and public facing training materials utilizing digital media including Microsoft PowerPoint.

Management and Leadership Skills:

4. Knowledge of supervisory management concepts and problem-solving skills, including experience in the principles and practices of conflict resolution, mediation, and negotiation.
5. Ability to establish and maintain effective working relationships with staff, management, the Board, other state agencies, external partners, and the public.
6. Knowledge of human resources needs and rights of employees, including Family Medical Leave Act (FMLA), Affirmative Action and reasonable accommodations, scheduling, time management, performance evaluation processes, and principles of equity and inclusion.
7. Demonstrated experience in providing leadership, team building, direction, coaching and training for employees.
8. Exceptional organizational skills with the ability to prioritize work and meet multiple deadlines while maintaining confidentiality, accuracy, and attention to detail.

Medigap Helpline Program Service Knowledge:

9. Knowledge of overall goal(s) and mission of the Board on Aging and Long Term Care and the Medigap Helpline program.
10. Knowledge or experience with gerontology and/or aging and disability programs.
11. Extensive knowledge of state statutes, regulations and guidelines related to Medicare and health insurance including but not limited to: Chapters 600 through 655 of the Wisconsin Statutes, and chapters INS 3, 26 and 28 of the Wisconsin Administrative Code.
12. Extensive knowledge of federal laws relating to Medicare, health insurance and long-term care finance including Social Security (Social Security Policy Operations Manual System – HL Health Insurance), Title XVIII 18 - Medicare and Title XIX 19 – Medicaid, Center for Medicare and Medicaid Services – Manual system, Supplemental Security Income (SSI), Older Americans Act (OAA) and common service delivery systems.

Communication Skills:

13. Effective written and verbal communication skills. Ability to communicate via a variety of media, including use of Outlook, Microsoft365 and virtual platforms such as Zoom and TEAMS.
14. Demonstrated strong public speaking skills and the ability to plan and conduct training programs before audiences of all sizes.
15. Knowledge of advocacy techniques on the individual level.
16. Excellent customer service and well-developed interpersonal skills.

Data Entry and Reporting Skills:

17. Demonstrated experience with inputting and retrieving data from various computer applications and/or databases.
18. Comprehensive understanding of agency database system report generation including reporting utilized for trend monitoring.

Special Requirements:

- The ability to independently travel periodically within the State of Wisconsin. A valid Wisconsin driver's license that meets the State's Risk Management requirements or the ability to obtain one's reliable transportation consistently.
- Must have the ability to lift 25 pounds on a regular basis, and occasionally 40 pounds with assistance.
- Must complete and obtain SHIP Advanced certification, insurance licensure in health and accident and life, and ongoing continuing education or training as assigned.