

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

MEDIGAP INSURANCE SPECIALIST

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future professional positions located within the Board on Aging and Long Term Care. Positions allocated to this classification provide health insurance counseling and information to medicare-eligible citizens. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area.

Classification decisions must be based on the “best fit” of the duties within the existing classification structure. The “best fit” is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification encompasses positions located within the Board on Aging and Long Term Care that provide informational and referral services to the consumers of insurance for the elderly and persons with disabilities through operation of a telephone helpline and other public information efforts. Positions allocated to this classification must meet the definition of professional employee, as defined in s. 111.81 (15), Wis. Stats.

C. Exclusions

Excluded from this classification are the following types of positions:

1. Positions that meet the statutory definitions of supervisor and/or management as defined in s. 111.81(19) and (13), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions which do not meet the statutory definitions of professional employee as defined in s.111.81 (15), Wis. Stats., as administered and interpreted by the Wisconsin

Employment Relations Commission.

3. Positions located outside the Board on Aging and Long Term Care.
4. Positions that provide professional counseling services in the areas of vocational rehabilitation, social work, psychology, or other human services specializations a majority of the time (more than 50%).
5. Positions that provide ombudsman and advocacy services which relate to long term care services provided to individuals and their families a majority of the time (more than 50%) and are more appropriately classified as Ombudsman Services Specialist.
6. All other positions that are more appropriately identified by other classification specifications.

D. Entrance Into This Classification

Employees enter positions within this classification by competition.

II. DEFINITIONS

MEDIGAP INSURANCE SPECIALIST

Positions in this classification provide health insurance counseling and information to Medicare-eligible citizens and their representatives and refer consumer complaints to the Commissioner of Insurance or to the Centers for Medicare and Medicaid Services. Positions provide direct counseling by telephone, written and electronic correspondence and/or in person to consumers regarding enrollment into Medicare, private Medicare health plans, or Medicare Prescription Drug options or regarding the purchase or replacement of Medicare supplemental health insurance, hospital indemnity, health maintenance organization, long-term care, nursing home, home health care, and other insurance products marketed to the elderly or to persons with disabilities. Positions may also provide counseling related to Medicaid issues, including spousal impoverishment, estate liability, Medicare savings programs, or counseling on employee-related coverages, active employer, retiree, COBRA/continuation coverages, and SeniorCare. Positions will be responsible for providing training to other professional agencies and consumer groups; and developing informational materials for public dissemination. Positions are initially under close supervision and progress to general supervision.

III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV. ADMINISTRATIVE INFORMATION

This classification was created, effective June 30, 2013 and announced in Bulletin OSER-0327-MRS/SC to establish a single level classification. The positions were previously classified as Medigap Insurance Specialist A, B that was abolished on the same date.

The specification was revised effective August 9, 2015 and announced in Bulletin DPM-0404-MRS/SC to reflect the updating of the language and the broadbanding of the classification.

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