



# Alabama SMP Volunteer Roles

Standard volunteer roles include, but may not be limited to, the following:

## 1. Distributing information (Orientation Training)

This role involves transporting and disseminating SMP (hard copy) information to sites and events; the role may also include reading or presenting prepared copy or performing scripted activities for outreach. This role does not involve engaging beneficiaries in individual discussions about personal information or situations. Any beneficiary requests for information or assistance that a volunteer receives while serving in this role are deferred to volunteers or staff who are qualified to handle simple inquiries and/or provide one-on-one counseling.

## 2. Assisting with administration (Orientation Training)

This role involves assisting the SMP through administrative work such as copying, filing, data entry and placing outbound phone calls in support of SMP activities (e.g., to reserve training space, confirm attendance at training, etc.). This role does not permit taking inbound phone calls or fielding questions from the public. Any requests for information or assistance that a volunteer receives while serving in this role are deferred to volunteers or staff who are qualified to handle simple inquiries and/or provide one-on-one counseling.

## 3. Staffing exhibits (Orientation and Foundations Training)

This role involves staffing information kiosks or exhibits at events. Volunteers who serve in this role are limited to providing general information about the SMP and Medicare/Medicaid fraud and abuse and do not engage in discussions of personal information or situations other than to answer simple inquiries. Requests for counseling are deferred to qualified SMP counselors.

## 4. Making group presentations (Orientation, Foundations and Group Education Training)

This role involves giving substantive presentations on SMP topics to audiences, and offering an opportunity for interaction with audience members. Group presentations include delivery of more complex information and/or opportunity for Q & A with the audience. Volunteers who serve in this role are limited to providing general information regarding the SMP and Medicare/Medicaid fraud and abuse and do not engage in discussions of personal information or situations other than to answer simple inquiries. Requests for counseling are deferred to qualified SMP counselors.

## 5. Counseling (Orientation, Foundations, and Counselor Training)

The counseling role involves direct discussion with beneficiaries about their individual situations and may include review of personal identifying information that includes Medicare Summary Notices (MSNs), Medicare cards, billing statements, medical records, and other related financial and health documents. When a volunteer who serves in this role determines that a beneficiary's case must be sent to a volunteer or staff person qualified to handle complex issues and possible referrals for investigation, she or he may receive and confidentially transmit the beneficiary's documents. Counseling discussions may occur either in-person or via telephone and may occur in locations other than SMP offices.

## 6. Other roles

Other volunteer roles may be created from time to time and as needed in the SMP.