

New Team Member Training - FAQs

PROGRAM INFORMATION AND STRUCTURE

What is the CHOICES program?

The CHOICES program (Connecticut's State Health Insurance Assistance Program) provides free, unbiased counseling to help Medicare beneficiaries, their families, and caregivers understand Medicare and make informed decisions about coverage options.

What do CHOICES Counselors do?

Counselors are expected to provide Medicare counseling, outreach, and assistance in accessible locations throughout the Agency on Aging's service area. Medicare counseling includes providing *free, unbiased* information on:

- Medicare Parts A, B, C, and D, including how and when to enroll
- Enrollment assistance and plan comparisons for Medicare Advantage Plans and Medicare Part D plans
- Eligibility screening and application assistance with cost-assistance programs, including Medicaid, the Medicare Savings Program, and the Low-Income Subsidy Program

Who can become a CHOICES counselor?

CHOICES counselors include **True Volunteers, and In-Kind Professionals**, who are passionate about assisting Medicare beneficiaries and are willing to complete the required training and certification.

Clients, beneficiaries, retirees, students, caregivers, and professionals without a conflict of interest

Differences between True Volunteer and In-kind Professionals?

While both in-kind professionals and true volunteers contribute their time and expertise to support the program, the key difference lies in their affiliation and compensation.

- **In-Kind Professional:**

An in-kind professional is someone who provides CHOICES-related services

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(such as Medicare counseling or presentations) **as part of their paid role with another organization**, for example, a municipal agent, social worker, or case manager. Although they are not paid by CHOICES, their employer supports their participation, and the value of their time is reported as an “in-kind” contribution to the program.

- **True Volunteer:**

A true volunteer is someone who **donates their time independently** and is **not compensated by any employer** for the CHOICES work they perform. They may be retired, semi-retired, or simply committed community members offering their services out of personal interest or civic engagement.

In short:

- If someone is **already being paid** by their primary employer while performing CHOICES duties, they are considered an **in-kind professional**.
- If they are **not being paid at all** for their CHOICES work, they are classified as a **true volunteer**.

CONFLICT OF INTEREST:

Per the guidelines from the State of CT-Bureau of Aging and Disability Services, individuals interested in taking the SHIP/CHOICES training **must not** have a conflict of interest. This includes anyone affiliated with an organization, agency, or business that receives payment, charges fees, or profits from providing Medicare-related services or products. This includes, **but is not limited to**, insurance companies, brokers, financial planners, or consultants who assist with Medicare plan selection for a fee in any way or form. To maintain the integrity of the program, all CHOICES counselors must remain neutral and provide **unbiased, free** assistance to beneficiaries.

All Certified CHOICES Counselors are required to conduct counseling sessions only at an approved site designated by the Regional Coordinator. These sessions must take place during the designated hours and within standard business hours, unless otherwise approved. It is also mandatory that all counseling sessions be accurately reported in the STARS system immediately upon completion. Timely reporting ensures program compliance, data accuracy, and continued federal and state support.

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TRAINING AND CERTIFICATION

Do I need prior healthcare experience to join?

No prior healthcare experience is required. However, good communication, organizational skills, and a desire to help others are essential.

What are the training requirements for new team members?

- Complete full application, including a background check
- Interview with the Agency on Aging CHOICES Regional Coordinator
- Attend Orientation (2 hours)
- Complete online modules (12 hours)
- Attend 3 full day training (18 hours)
- Pass an online exam, sign Memorandum of Understanding
- Shadow other Team Members (time depends)

What does the training process involve?

The training includes completing an online course, attending in-person sessions, and passing a certification exam. The course covers Medicare basics, state-specific resources, and client counseling techniques.

How long does it take to become certified?

The certification process typically takes between 4–8 weeks, although it may vary.

Is there a cost for training materials?

for True Volunteers, the training is free. However, for In kind interested individuals, Yes, there is a \$125 fee for training materials, which covers manuals, guides, and other resources.

Do I have to attend other trainings?

Yes, to keep certification active, the CHOICES program offers 4 update trainings per year, and you must attend at least two out of the four update trainings (one of which MUST be the October CHOICES counselor update training). Trainings from other

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partners happen throughout the year are held which may be attended (and recommended).

Do I have to report on my activities?

Yes, you are required to report on everyone you talk to about Medicare. You will receive training on reporting during the training. Failing to report on your activities may result in losing your CHOICES Certification.

Will I be issued a laptop for CHOICES Counseling?

Unfortunately, no, the CHOICES program does not offer equipment as part of this volunteer endeavor. It is our hope the CHOICES host site (the site where you will perform your volunteer activities) can provide the equipment you need. Or you can use your personal laptop if confidentiality is followed.

COMMITMENT AND RESPONSIBILITIES

What is the time commitment for CHOICES volunteers?

Volunteers typically dedicate 4–10 hours per week, depending on their availability and the needs of their assigned counseling sites.

Can I choose where to provide counseling?

Counselors are often assigned to local senior centers, libraries, or community organizations, but assignments may vary based on availability and program needs.

Am I required to meet a minimum number of counseling hours?

no, however, certificate compliance is required to maintain an active status.

SUPPORT AND RESOURCES

What kind of support will I receive as a CHOICES counselor?

Trainees and certified counselors have access to ongoing mentorship, regular updates on Medicare policies, and assistance from program coordinators.

What resources are available to help me counsel clients?

Counselors have access to Medicare handbooks, online tools, and direct guidance from Regional Coordinators.

ADDITIONAL INFORMATION

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Can I continue to work full-time and still be a CHOICES volunteer?

Yes, full-time professionals, particularly in-kind professionals, can balance their primary work commitments with CHOICES volunteering. Participating in CHOICES not only aligns seamlessly with their existing roles but also enhances their ability to serve clients effectively. The program equips in-kind professionals with specialized knowledge about Medicare, Medicaid, and related programs, allowing them to offer more comprehensive support to the populations they already assist.

How does the program ensure client confidentiality?

All CHOICES counselors are trained in confidentiality protocols and must adhere to strict guidelines to protect client information.

What happens if I can't continue as a counselor?

If circumstances change, you can discuss your availability with the program coordinator.