

Assister 101

A Go-To Guide for Navigators & CACs

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What are we going to cover?

- The Basics:
 - Time Management
 - What do I ask on an initial phone call?
 - What do I give the person I'm helping?
 - What do I remind consumers as they leave?
- Outreach & Education
 - What do I bring to enrollment & outreach events?
 - Partnerships
- Resources
 - Where can I go with my questions?
 - Reporting

Basics: Time Management

- Keeping phone calls brief
- What is the goal of the meeting?
 - Initial Eligibility
 - Full Application
 - Plan Selection
- Examples: HMP, Marketplace, Different Immigration Status/Language, In Office, Enrollment Event
- At enrollment events - organizing order of consumers

Basics: The First Phone Contact

- Introduce yourself
- Ask for Permission
- What are the questions I should ask?
 - What do you think your income will be for the entire year of 2016?
 - How big is your household?
 - Are you a US citizen? Were you born in the US? How long have you been in the US (with documentation?)
- Keep it Conversational

Basics: Making an appointment

- What should I tell consumers to bring to our meeting?
 - All sources of income for all household members
 - Social Security Number (SSN) for those applying
 - Date of Birth (DOB) for all household members
 - Certificate of Citizenship or Certificate of Naturalization (not Passports)
 - Employer Name & Phone Number
 - Email login: userid, password, and the address!
 - Account information (if they already have an account)

Basics: In Person Contact

- What do I give the client?
 - Worksheets
 - Written information
 - web address for marketplace or HMP
 - username
 - password
 - security questions
 - what is (and is NOT) capitalized
 - Access to a printer or writing things down?
- What do I say at the end?
 - Making a follow-up appointment
 - Re-enrollment information

Incorporating Health Literacy

Literacy education happens throughout our contacts!

- Explaining things before being asked for clarification
- Keep it simple, use plain language
- Research

Referrals:

- Local agencies
- Michigan State University Extension
Smart Choice, Money management
- Coverage 2 Care (C2C)
[Printable sheets](#) or materials to order
Choosing insurance through navigating healthcare



Outreach, Education, Enrollment

- Checklists
- Federal Poverty Guidelines
- “Cheat Sheets”
- Location-specific flyers
- Upcoming events
- Agency information
 - Brochures
 - Program flyers - target populations

Partnerships with other Agencies

- Can we partner with other agencies?
 - Insurance companies – no
 - Agents – no
 - Most others – yes
- What kinds of agencies should we partner with?
 - Common mission/goals
 - Complimentary missions/populations
- How do we decide on target populations?

Reporting

- Navigators
- CACs
- Agency requirements
- Grant requirements

Alison D - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Team

I45 fx

	A	B	C	D	E	F	G	H	I	J	K	L
1	Date	Patient	Referred	Language	Method	Notes	Result 1	Result 2	Total #	Insurance	Encounter	Assister
4	10/1/2015	no	no	English	appointm	Medicaid proofs	Assist	Educatio	2	medicaid	2nd	Alison D
5	10/1/2015	unknown	no	English	appointm	Medicaid proofs	Assist	Educatio	5	medicaid	2nd	Alison D
6	10/1/2015	no	yes	English	appointm	Marketplace proofs	Assist	Educatio	1	priority he	1st	Alison D
7	10/1/2015	no	no	English	appointm	Medicaid app	Assist	App Com	2	medicaid	1st	Alison D
8	10/1/2015	unknown	no	English	Community	Event	Assist	Educatio	3	unknown	1st	Alison D
9	10/2/2015	unknown	no	English	phone	returned/answered calls	Assist	Educatio	5	unknown	1st	Alison D
10	10/5/2015	yes	no	English	appointm	medicaid HMO enrollment i	Assist	Enrolled	1	medicaid	1st	Alison D
11	10/5/2015	yes	no	English	Walk-In	reapp - did not return redet	Assist	Educatio	1	medicaid	1st	Alison D
12	10/5/2015	yes	no	English	Walk-In	faxing paperwork	Assist	Educatio	2	medicaid	2nd	Alison D
13	10/5/2015	yes	no	English	Walk-In	retro Medicaid	Assist	Educatio	2	medicaid	1st	Alison D
14	10/6/2015	no	yes	English	Walk-In	retro Medicaid	Assist	Educatio	3	medicaid	2nd	Alison D
15	10/6/2015	yes	no	English	Walk-In	redetermination	Assist	Educatio	4	medicaid	3rd	Alison D
16	10/6/2015	yes	no	English	appointm	insurance options	Assist	Educatio	1	medicare	1st	Alison D
17	10/6/2015	unknown	no	English	phone	answered calls	Assist	Educatio	8	unknown	1st	Alison D
18	10/7/2015	yes	no	English	Walk-In	redetermination	Assist	Educatio	1	medicaid	2nd	Alison D
19	10/7/2015	yes	no	English	Walk-In	retro Medicaid	Assist	Educatio	6	medicaid	2nd	Alison D
20	10/7/2015	yes	no	English	Walk-In	faxed proofs	Assist	Educatio	7	medicaid	3+	Alison D
21	10/7/2015	unknown	no	English	phone	answered calls	Assist	Educatio	8	unknown	1st	Alison D
22	10/7/2015	unknown	no	English	appointm	plan selection	Assist	Educatio	8	priority he	3+	Alison D
23	10/8/2015	yes	no	English	Walk-In	medicaid info x 3	Assist	Educatio	6	medicaid	1st	Alison D
24	10/8/2015	yes	no	English	Walk-In	did not return redeterminat	Assist	Educatio	2	medicaid	1st	Alison D
25	10/8/2015	unknown	no	English	Walk-In	faxing paperwork	Assist	Educatio	2	medicaid	2nd	Alison D
26	10/9/2015	yes	no	English	Walk-In	scheduled for Michelle x 3	Assist	Educatio	3	medicare	1st	Alison D
27	10/9/2015	yes	no	English	Walk-In	lost Medicaid - return with p	Assist	Educatio	3	medicaid	1st	Alison D
28	10/9/2015	yes	no	English	Walk-In	did not return redeterminat	Assist	Educatio	2	medicaid	1st	Alison D

Resources

- [Healthcare.gov](https://www.healthcare.gov)
- [Centers for Medicare and Medicaid](https://www.cms.gov) (CMS)

Webinars, resources and fact sheets:

- [Families USA](https://www.familiesusa.org) – consumer-focused,
- [EnrollMI](https://www.enrollmi.org) – find Navigators and CACs
- [Out2Enroll](https://www.out2enroll.org) – LGBT community-focused
- [Health Reform Beyond the Basics](https://www.healthreformbeyondthebasics.org)- basics webinar series!

Peer and expert support

- [In the Loop](https://www.intheloop.org) – confidential assiter forum, expert support
- [Michigan Primary Care Association](https://www.michiganprimarycare.org)(MPCA)

Questions?

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