

The Outreach and Enrollment Playbook

Strategies for Leveraging the Coverage Expansion Opportunity



Michigan Primary Care Association
www.mpca.net

Your Playbook

- Recognize Your Stakeholders
 - Staff, Patients, Community Members and Partners
- Designate a “Playmaker”
 - This undertaking needs a coordinator and a strong team to ensure success
- Construct a Plan
 - Draw from our strategies where helpful and add your own for a comprehensive approach
- Create Measures of Success
 - Agree on metrics and track them from the start to measure progress against a benchmark



The Outreach and Enrollment Playbook

Advance your Operational and Staffing Infrastructure



Staffing Plays

1. Anticipate Patient Needs
2. Educate All Staff
3. Train Assisters
4. Develop Enrollment Assistance Processes
5. Undertake Quality Assurance
6. Scale Up Assistance



Anticipate Patient Needs

- Research from Enroll America points to a few important statistics...
 - 78% of uninsured lack awareness of new options for insurance (83% amongst those likely Medicaid eligible)
 - 75% would like in-person assistance, especially in figuring out what financial help they could receive and in selecting a plan
 - Provider offices (you) are number three on the list of places the uninsured will turn to for help



Anticipate Patient Needs

- Apply the research to “math it out” and develop an informed estimate

Number of Uninsured \times 83%

= Number of patients that need coverage education

Number of Potentially Medicaid Eligible Patients \times 75% / 12

= Number of potentially Medicaid eligible patients that need enrollment assistance per month

Number of Other Uninsured Patients \times 75% / 6

= Number of patients per month that need enrollment assistance during the first open enrollment period



Educate All Staff

- Does every staff member in your Health Center understand how the ACA will affect your organization? Your patients?
 - Can every staff member seamlessly guide a patient to coverage resources and enrollment assisters?
 - Do your staff understand the importance of providing this assistance for patient retention?
- How can you incorporate this basic training into existing staff/team meetings?



Educate All Staff

- What should all Health Center staff understand in relation to outreach and enrollment?
 - How coverage can improve patients' access to care and health status
 - Changes to the Medicaid program
 - Basics of the new health insurance marketplace and coverage tax credits (out-of-pocket cost)
 - Essential health benefits (what's covered)
 - The coverage mandate
 - How to refer a patient to enrollment assisters
 - Patient retention strategies
- Get started with the basics today!



Train Assisters

- Staff providing direct enrollment assistance will need a high level of expertise in coverage issues across Medicaid, MIChild and plans sold in the marketplace
 - The content is more complex than previous enrollment assistance training programs
 - Training is expected to be intensive; competency assessments are likely with strong ongoing oversight
- Visit the O&E toolkit at www.mpca.net/outreach for complete training information!



Develop Enrollment Assistance Processes

- Educating staff and training your assisters is a great start, but consistent enrollment processes are indispensable
 - Think about the enrollment process from start to finish
 - Document the steps, the tips, the tricks, website URLs, helpful links, troubleshooting resources, patient take-away materials, etc.
 - Build on the standard operating procedures issued by CMS
- Enrollment processes help to ensure patients receive quality assistance across the organization
 - Start thinking about the processes today and build them into your plan for the future!



Undertake Quality Assurance

- We measure and pursue quality improvement for most services in Health Centers... should enrollment assistance be treated in the same manner?
 - Think about key indicators of patient satisfaction with their enrollment experience
 - Implement a methodology to use satisfaction results for staff and process development



Scale Up Assistance

- Use a mix of enrollment assisters to meet the needs of your patients
 - Do you have sufficient staff to provide enrollment assistance?
 - Can staff be temporarily re-assigned to help with enrollment?
 - Can you incorporate additional AmeriCorps members or other volunteers?
 - Do you have organizational partners with enrollment capacity?
- Plan for high demand in the first six months, concentrated toward the middle/end of open enrollment
- Scale up over time to be ready for that demand



Operational Plays

1. Gather Patient Income Information
2. Update Patient Contact information
3. Get Consent to Contact
4. Develop Useful Reports
5. Map Patient Entry Points
6. Leverage Financial Processes
7. Structure Patient Visits



Gather Patient Income Information

- 26% of Michigan Health Center patients do not have a Federal Poverty Level percentage reported in UDS
 - Is your Health Center's data "better or worse?"
- If you don't know your patients' income data how can you proactively reach out to those who are likely eligible?
 - How can you work to record and/or update this information?



Update Patient Contact information

- What systems do you have in place to update patient contact information?
 - How well are they working?
 - Are you periodically verifying the validity of phone numbers?
- Are you collecting the full range of patient contact information?
 - Text message enabled mobile phone numbers? Email? Facebook? Mailing address?



Get Consent to Contact

- Does your Health Center include an “express consent” to contact statement in patient forms (or other tools) for non-traditional contact methods?
 - Voice broadcast and text messages are very cost-effective in-reach tools, but you need permission to contact!



Develop Useful Reports

- How quickly can you retrieve the patient information you need to pursue in-reach strategies?
 - In what format does that information export from your PM or EHR system?
- Your ability to pull useful data on currently uninsured, likely eligible patients will be essential...
 - Start generating and “tweaking” those reports today to ensure they work well!



Map Patient Entry Points

- How do your patients connect with the Health Center on a routine basis?
 - Scheduling? Check-In? Patient Portal? Nurse Triage? Case Managers? Outreach Workers? Group Visits? Preventive service reminders?
- How can you institutionalize a process at each entry point to educate and assist potentially eligible patients?
 - Map the touch points and treat each one as an opportunity.
 - Focus on consistency across the organization!



Leverage Financial Processes

- How can Health Center financial processes be used to engage patients in a conversation about coverage?
 - Collecting co-pays and nominal fees?
 - Patient questions/calls on balances due?
 - Mailing patient statements?
 - Sliding fee applications and updates?
- How can you best leverage the processes you already have in place?
 - Again, map the processes and use each one as an opportunity!



Structure Patient Visits

- How many opportunities exist within the flow of a patient visit to educate and assist with coverage?
 - The waiting room?
 - Front desk staff interactions?
 - Clinical support staff interactions?
 - Waiting in the exam room?
 - Follow-up appointment scheduling?
- How can you structurally engrain coverage conversations into the visit?
 - PM / EHR Templates
 - Patient Forms
 - Patient Education Materials





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Break Down Barriers



Address Barriers Head On

- Health Centers are experts in designing health care services to meet community needs
 - Use a similar assessment and program design process for enrollment services
 - Don't rely on assumptions and conventional wisdom- get data, talk to patients, use community informants, test your ideas
- Think about the barriers you uncover as you select and implement strategies in your playbook
 - Be deliberate!



Organizational Barriers

- Approachability
 - How do we encourage and support patients who need enrollment assistance?
- Availability
 - How do we expand access to enrollment assistance?
- Language
 - How do we prepare for providing assistance in multiple languages?
- Competing Priorities
 - How do we ensure enrollment assistance services have the resources needed to be successful?



Patient Barriers

- Lack of Transportation
 - What methods can we use to reduce transportation barriers?
- Literacy
 - How do we simplify our language and materials to be easily understood?
- Satisfaction
 - How do we combat clients' past (potentially negative) experience with benefit programs?
- Social Stigma
 - How do we “de-couple” the enrollment process from perceived stigmas?
 - How do we reassure Medicaid beneficiaries feel they are respected?



New Challenges

- To name just a few...
 - Lack of awareness of new coverage options and how programs are changing
 - Tax credit implications
 - Opposition to the mandate
 - Out-of-pocket costs
 - High levels of skepticism
 - Discomfort using a website to enroll
 - Low level of health insurance knowledge
 - Affordability (perception and reality)



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Connect with Key Audiences



Raising Awareness

- The four most important facts for patients to hear from you:
 - There will be new, affordable insurance options available for people without insurance
 - All insurance plans will have to cover doctor visits, hospitalizations, maternity care, emergency room care, and prescriptions
 - Financial help is available so you can find a plan that fits your budget
 - All insurance plans will have to show the costs and what is covered in simple language with no fine print
- A message with all four facts reaches 87% of the uninsured population!



Motivation

- Affordable (“Fits Your Budget”)
- Comprehensive Coverage (Range of Services / Regular Care)
- Financial Security (From Bills and Debt)
- Plan Security (Peace of Mind When The Unexpected Happens)



The Research

- Findings from a National Study On Enrolling in Health Care Coverage
 - <http://bit.ly/YtRYM0>
- Preparing for 2014: Findings from Research with Lower-Income Adults
 - <http://bit.ly/I0u5y4C>
- Social Marketing Research for the Health Insurance Marketplace
 - <http://go.cms.gov/ZyStEs>



Tools to Connect (In-Reach)

- Flyers / Brochures
- Fact Sheets / Cards
- On-Site Promotions
- Staff Promotions / Contests
- Posters
- Direct Mail
- Text (and/or Voice) Messaging
- Newsletter
- Website
- Social Media



Tools to Connect (Outreach)

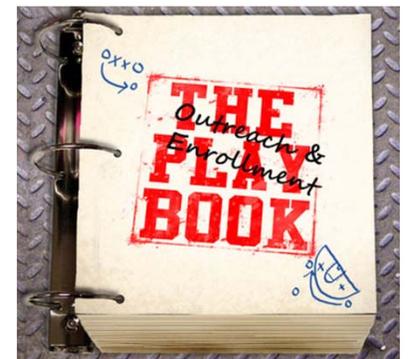
- Flyers / Brochures
- Website
- Social Media
- Earned Media
- Search Engine Marketing
- Local Advertising
- Community Events
- Community / Partner Websites and Publications





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Enroll



The Health Center Role

- The federal government, several national campaigns and state efforts will be broadly conveying the messages we discussed today...
 - Local organizations like your Health Center are pivotal in reinforcing these concepts and encouraging enrollment actions



Put Your Plan in Action

- The plays in your playbook should prepare your Health Center for enrollment, carry you through peak open enrollment demands and beyond to Medicaid expansion enrollment
 - Patient enrollment actions may not be immediate, but the pace should pick up quickly and continue to be vigorous



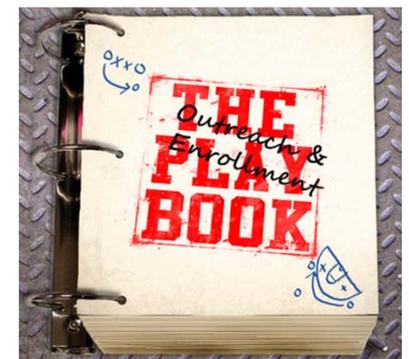
Be Vigilant

- Watch indicators of success closely and adjust your strategies
 - Outreach and enrollment is not a science... some strategies may be more successful than others with different populations
 - Make course corrections quickly to maximize efficiency and return on your efforts
 - Report issues you encounter quickly for broader troubleshooting



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Retain



Retain Your Patients

- What strategies can you employ to ensure patients gaining coverage continue to use the Health Center?
 - Ensure patients know you accept their new health insurance plan
 - Account for the perception they should leave the Center to “make room” for the uninsured
 - Use the opportunity to talk about PCMH
 - Emphasize your breadth of service and convenience
 - Emphasize the quality of care
 - Emphasize your community “roots” and investment in the area
 - Emphasize your connection to other community organizations and services



Further Information

www.mpca.net/outreach

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