

Tools to Verify Medi-Cal Enrollment, and Increase Enrollment-Retention in Health Insurance for Children



The
California
Endowment

**CMS**
CENTERS FOR MEDICARE & MEDICAID SERVICES

Presenters

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What We'll be Covering Today

- ▶ A Software Tool for:
 - ▶ Verifying students with active Medi-Cal eligibility
 - ▶ Identification of students whose Medi-Cal has been discontinued
- ▶ Case Management strategies for Outreach and Enrollment to students lacking active Medi-Cal coverage
- ▶ Questions and Answers

CHIPERS:

**Children's Health Insurance Program
Enrollment and Retention Software**

Software designed to match your
student enrollment to Medi-Cal
eligibility status

Data Driven Outreach Efforts to Reach Students With Discontinued Medi-Cal

CHIPERS, www.chipers.org

Outreach Efforts, based on real time data, designed to identify Students With Discontinued Medi-Cal

- Software is a product of a federal grant to develop new methods for enrolling children in Medi-Cal
- The result is a web based, free program, available to all schools in CA.
- The school must be an participant in the LEA Medi-Cal Billing Program, a program whereby schools who provide health services get reimbursed by the Medi-Cal program.

A Quick Look at How Students are Identified



SKIP STEPS 2-4 BY OBTAINING YOUR FILE FROM YOU MEDI-CAL BILLING VENDOR

OR

Work with your Medi-Cal Billing Vendor to Complete Steps 2 & 3 for you

- The billing vendor your school district uses to submit claims to Medi-Cal is already verifying your student's eligibility on a regular basis
- The school district may need to slightly modify the data given to the vendor so it makes identifying the student's school of attendance possible
- Many school LEA Medi-Cal billing vendors are already participating and assisting their schools.

The CHIPER Report

Students who have lost their Medi-Cal coverage for 2-3 months are indicated with a “Y” in the HOT LEADS column. These students are the target group for outreach and enrollment.

| | A | B | C | D | E | F | G | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | |
|------|--------------|--------------|------------|------------|------|-------------|-----|------------|-------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|---|
| | BIC | Last Name | First Name | DOB | Gndr | School Site | Grd | M-C SOC An | Enrllmnt Hot Lead | Nov 2012 | Nov 2012 | 2012 Oct | 2012 Sep | 2012 Aug | 2012 Jul | 2012 Jun | 2012 May | 2012 Apr | 2012 Mar | 2012 Feb | 2012 Jan | 2011 Dec | 2011 Nov | |
| 189 | XXXXXXXXXXXX | ANDERSON | Alejandra | 2005-02-28 | M | ARE | 2 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 306 | XXXXXXXXXXXX | Ashurst | Alexis | 2004-02-20 | F | AVE | 3 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 307 | XXXXXXXXXXXX | Atherton Wz | Alexis | 2000-04-30 | F | AVE | 7 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 326 | XXXXXXXXXXXX | Avalos | Alexxus | 1995-02-02 | F | AVE | 12 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 328 | XXXXXXXXXXXX | AVALOS | Alexyss | 2000-04-21 | F | AVE | 7 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 330 | XXXXXXXXXXXX | Avalos | Aleyda | 2001-09-29 | M | AVE | 6 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 335 | XXXXXXXXXXXX | Avalos | Ali | 1995-02-02 | F | AVE | 12 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 388 | XXXXXXXXXXXX | Baca | Alondra | 1997-01-19 | M | AVE | 10 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 486 | XXXXXXXXXXXX | Barnhill | An | 2005-12-13 | M | AVHS | 1 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 516 | XXXXXXXXXXXX | Barrueta | Anayali | 2000-04-10 | M | AVHS | 6 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 554 | XXXXXXXXXXXX | Beam | Andrew | 2003-01-25 | M | AVHS | 4 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 765 | XXXXXXXXXXXX | Brady | Areli | 1999-09-10 | M | CCSNB | 8 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 766 | XXXXXXXXXXXX | Brady | Areli | 1998-02-13 | F | CCSNB | 9 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 979 | XXXXXXXXXXXX | CALDERWOC | Berenice | 1997-01-02 | F | LYLE | 11 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 980 | XXXXXXXXXXXX | Caldwell | Berenice | 2005-12-06 | F | LYLE | 1 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1114 | XXXXXXXXXXXX | Case | Brian | 1996-11-18 | F | LYLH | 11 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1154 | XXXXXXXXXXXX | Castro Fuent | Brittany | 2005-08-31 | M | LYLH | 2 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1161 | XXXXXXXXXXXX | Caughron | Brittany | 2004-09-09 | M | LYLH | 2 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1162 | XXXXXXXXXXXX | Caughron | Brittany | 2006-09-27 | M | LYLH | 1 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1252 | XXXXXXXXXXXX | Chavez | Calyxx | 1999-11-26 | F | MAN | 8 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1406 | XXXXXXXXXXXX | Cortes Zepel | Cesar | 2003-02-18 | M | MEMG | 4 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | N | N | N | N | N |
| 1444 | XXXXXXXXXXXX | Crippen | Chase | 1995-04-01 | F | MEMG | 12 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1553 | XXXXXXXXXXXX | Davis | Claudia | 1995-02-08 | F | MEMH | 12 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1613 | XXXXXXXXXXXX | Delgado | Colton | 1999-03-21 | M | MEMH | 8 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 1968 | XXXXXXXXXXXX | Fashauer | Destiny | 2006-05-15 | M | RVE | 1 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2162 | XXXXXXXXXXXX | Frease | Edson | 1997-08-24 | M | RVSP | 10 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2205 | XXXXXXXXXXXX | Fuentes | Eliana | 2000-09-04 | M | SE | 7 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2213 | XXXXXXXXXXXX | Fuentes Agu | Elijah | 2007-03-16 | M | SE | 0 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2217 | XXXXXXXXXXXX | FUGET | Elijah | 1995-09-05 | M | SE | 12 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2501 | XXXXXXXXXXXX | Gonzalez | Everett | 1997-01-25 | M | UKCA | 10 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2814 | XXXXXXXXXXXX | Hatch | Hailee | 1994-05-28 | M | UKEP | 12 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2839 | XXXXXXXXXXXX | Haynes | Hailey | 2006-05-01 | F | UKEP | 1 | | Y | | N | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | N |
| 2942 | XXXXXXXXXXXX | Hernandez | Hugo | 2008-09-10 | M | UKFZ | P | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 2972 | XXXXXXXXXXXX | Herrera | Ingrid | 1997-11-25 | F | UKFZ | 10 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |
| 3049 | XXXXXXXXXXXX | Hodse | Isaias | 2003-11-06 | M | UKFZ | 4 | | Y | | N | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y |

NOTE: Information in this slide is an example and does not reflect actual children.

MANAGING YOUR DATA ONCE IT HAS ARRIVED

- ▶ 1. Delete the Column that contains the BIC
- ▶ 2. Filter for HOT LEAD students
- ▶ 3. Hide the Columns that have all the historical eligibility data (optional)
- ▶ 4. Sort by school
- ▶ 5. Sort each school by last name (identifies potential siblings)
- ▶ 6. Put in page breaks between schools (if that is how the outreach is going to be broken up)
- ▶ Optional:
 - ▶ Add a Column Header for Parent Name and Telephone
 - ▶ Add a Column Header for Outreach Information: Contacted or whatever you want

ALL UNDERLINED WORDS ARE SIMPLE OPERATIONS IN EXCEL, IF YOU ARE HAVING DIFFICULTY SEARCH YouTube FOR HELP, OR ASK SOMEONE IN YOUR DISTRICT WHO WORKS WITH BUDGETS FOR ASSISTANCE.

Conducting Outreach

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the frame, creating a modern, layered effect. The text 'Conducting Outreach' is centered in a clean, sans-serif font, colored in a medium green that matches the background's palette.

Case Management Overview

- Parents of students who have been identified as having had a loss of Medi-Cal coverage are contacted by school staff to confirm the loss of coverage.
- If loss of coverage is confirmed, then an offer is made to assist the parent with re-application. This can be done directly by the school or transferred to a community organization.
- CHIPERS.org contains field tested and proven call scripts and letters for use in outreach to parents and guardians.

The Information of Who has Medi-Cal is
Sensitive and Requires Special Handling

Case Management, the particulars

- **Identifying who to call and offer assistance is a critical step prior to handing the information off to a Outreach Worker**
- **Obtain family contact information from the school contact information. Remember you may ask school site secretaries if the electronic record is the most current or up to date, or a rolodex she has on her desk.**
- **If having difficulty reaching the family, ask the health staff who they call when the child is ill at school**
- **Note that the family may have moved, which is why the Medical has been discontinued**

Case Management, Teamwork

Internal Outreach Team

- School Admin
- IT
- Excel Report
- Outreach

External - Enrollment and Redetermination support

- County DDS
- Community Based Organization
- Health Plan Partners

Case Management

- There must be Outreach Workers in place to make the phone calls and connections to assist the families back into coverage.
- It is helpful to have a case management database system.
- Mendocino County utilized a free non-profit version of Salesforce to manage information by family groups and included information regarding Cal-Fresh. In addition they scanned and place important documents such as birth certificates in the family file for future retrieval when the family again let the account lapse.
- They set up a reminder system for those families they knew were going to need assistance annually for renewal.

THK has a variety of tools to help you collect data, ask if you want templates that you can use to modify for you needs.

CHIPER: Marketing Your Outreach Services

- **Once the community became aware of the School Outreach resources, it became a trusted service in the community and was sought out by friends, families throughout the local area. Families now use these resources for assistance with annual renewals, and bring in their friends for services.**
- **Many of the resource centers are sustaining by obtaining outreach funds for Cal Fresh, which is an easy program to qualify for when you have the Medi-Cal eligibility application information.**

CHIPERS

POSITIVE UNINTENDED OUTCOMES

- The CHIPER CMS grant resulted in identifying other children within the household, or are part of the extended family, who either do not have Medi-Cal or have lapsed Medi-Cal. This results in additional enrollments through the project.
- Parents who have positive experiences with the outreach/referral and application assistance actively refer other families to use our services.

Q&As- The Most frequently asked question:

1. What do I say when I Call?
 1. There is a script posted on the CHIPERS website, <http://chipers.org/chiper-form/Docs/CHIPERCallScript.pdf>
2. What do I say when the family is unaware their Medi-Cal has been discontinued?
 1. Let them know that your school provides health services and as part of that service they monitor student Medi-Cal eligibility. If they are unsure that your information is correct, have them contact the local Department of Social Services to reconfirm.

Q&As- The Most frequently asked question:

1. What do I do when I can't reach the family.
 1. Two calls with voice messages left (see script) and then send a letter. Some families have moved, their cell phones are out of minutes, voice mail is not set up. Or maybe they obtained health coverage through a employer or bought insurance through the ACA.
 2. You probably have plenty of more clients to call, a new list can be generated the first of every month.

Questions and Answers

The background features abstract, overlapping geometric shapes in various shades of green, ranging from light lime to dark forest green. These shapes are primarily located on the right side of the slide, creating a modern, layered effect. The text 'Questions and Answers' is centered horizontally and rendered in a bold, dark green sans-serif font.