



Department of Health Care Services **BULLETIN 2020-001**

DATE: 03/09/2022 (Revised 11/15/2022)

TO: All Participating Counties

FROM: Medi-Cal Health Enrollment Navigators Project (Navigators Project)

SUBJECT: Permissible and Excluded Activities (Revised)

The Department of Health Care Services (DHCS) is providing guidance to clarify the activities a county or a county acting jointly with community-based organizations (CBO) may include as part of their outreach, enrollment, and retention efforts using Navigators Project allocations.

If the organization entered into a Privacy and Security Agreement (PSA) with DHCS, the following activities are permissible/excluded under the organization's current agreement:

Activities Under the PSA	
Permissible	Excluded
<p>Enrollment:</p> <ul style="list-style-type: none">- Translation activities related to enrollment or navigation services.- On-site resource during outreach efforts.- Conduct presentations and educate public at outreach events.- Assist the beneficiary or answer questions to help complete an application.- Assist with completing the Medi-Cal application and related forms. (Paper or electronic format)- Assist with explaining, obtaining, and/or making required verifications for points of Medi-Cal eligibility available to the county Medi-Cal eligibility staff.	<p>Enrollment:</p> <ul style="list-style-type: none">- Case processing for eligibility determinations or terminations.

<p>Retention:</p> <ul style="list-style-type: none"> - Cold calls/outreach to beneficiaries due for redetermination. - Cold calls/outreach to beneficiaries who have been discontinued during redetermination, only during the ninety (90) day cure period. - Assist with completing Medi-Cal redetermination forms. (Paper or electronic format) - Assist with explaining, obtaining, and/or making required verifications for points of Medi-Cal eligibility available to the county Medi-Cal eligibility staff. 	<p>Retention:</p> <ul style="list-style-type: none"> - Case processing for eligibility redeterminations or terminations.
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Activities Under the PSA (continued)	
Permissible	Excluded
<p>Navigation:</p> <ul style="list-style-type: none"> - Translation activities related to enrollment or navigation services. 	<p>Navigation:</p> <ul style="list-style-type: none"> - Assistance in assessing the best program options and identifying medical providers. - Coordinate mental, medical and dental care visits. - Provide assistance in accessing care including mental, medical and dental services. - Provide transportation services to mental, medical, and dental care visits.

If the organization has entered into a Business Associate Addendum (BAA) with DHCS, the following activities are permissible/excluded (in addition to the Enrollment and Retention activities listed above):

Activities Under the BAA	
Permissible	Excluded
Navigation: - Assistance in assessing the best program options and identifying medical providers. - Coordinate mental, medical and dental care visits. - Provide assistance in accessing care including mental, medical and dental services.	Navigation: - Provide transportation services to mental, medical, and dental care visits.