

In-Home Support Services MOU Template Post-Release Webinar

Objectives for Today's Discussion



Review the Released In-Home Supportive Services (IHSS) MOU Template



Review Next Steps for Executing the MOU and the MOU Execution Timeline



Q&A regarding the MOU template and execution timeline

Goals of the Memorandums of Understanding (MOUs)

The 2024 Medi-Cal Managed Care Contract (Contract) requires all managed care plans (MCPs) to enter into MOUs with counties and third-party entities (Other Parties) to contractually ensure the provision of whole-system, person-centered care.

DHCS Goals for Requiring MOUs

- **Establish minimum requirements** around key Contract provisions for MOUs (e.g., training, data-sharing.)
- Clarify **roles and responsibilities for coordination of the delivery of care and services** of all Members, including across MCP carved out services
- Establish **formal processes for how MCPs and Other Parties will collaborate and coordinate on population health programs**, including referring and linking Members to Community Supports
- Establish **data sharing pathways** between MCPs and Other Parties to support care coordination and enable robust monitoring
- Provide mechanisms to ensure **overall oversight and accountability** for MCPs to execute MOUs with Other Parties
- **Provide transparency** into roles/responsibilities and relationships between MCPs and Other Parties

MOU templates incorporate **existing service and program requirements into a single document** to support MCP/Other Party decision-making and relationship building. Templates are more robust where DHCS has promulgated detailed policies/guidance.

MOU Requirements & Structure

The WIC MOU Template is part of a broader set of documents and additional items focused on the release and execution of the MOUs. These items include:

APL on MOU Requirements

APL 23-029 explains the Base MOU Template and Bespoke MOU Templates

- Explains the intent and purpose of the provisions set forth in the MOUs
- Sets expectations of MCPs, such as an annual review of the MOU
- Details requirements related to MOU execution and submission to DHCS
- Lays out a monitoring plan for how DHCS will oversee MCP compliance with the MOU requirements

Base MOU Template

Contains provisions that must be included in all MOUs

- Clarifies roles and responsibilities of MCP and Other Parties
- Establishes “rules of engagement” to cooperate and address disputes
- Includes DHCS recommended optional provisions that parties may consider for execution

Bespoke MOU Templates

Specific to MCP and Other Party’s relationship and programs applicable under the MOU (e.g., WIC)

- Contains the general and program-specific required provisions, including incorporating Other Party requirements based on existing guidance
- Contains DHCS recommended optional provisions that parties may consider for that particular MOU
- Links to specific policies incorporated in the MOU

Overview of MOU Resources

DHCS is releasing resources to assist MCPs and Other Parties with implementing the MOUs

» [DHCS MOU Webpage](#)

- Houses the DHCS issued APL 23-029, Base MOU Template and Bespoke MOU Templates
- MOU FAQs (forthcoming)
 - Provide additional guidance on the APL, Base MOU, and Bespoke MOU Templates
 - Clarifies aspects of MOUs in response to stakeholder feedback
 - Examples of questions answered include: “What are the optional provisions?”; “How can the parties share data?”; and “How will the MOUs be enforced?”
- Other updates will also be posted on the webpage as they become available

» **Technical Assistance**

- DHCS will be providing technical assistance as needed
- DHCS MOU email address: MCPMOUS@dhcs.ca.gov



Purpose of the IHSS MOU Template

Level Setting

The IHSS MOU template seeks to improve care coordination between MCPs and county IHSS programs through the following:

- » Opening channels of and improving communication between MCPs and counties to coordinate care for individuals receiving services from both parties and to address concerns related to care coordination.
 - This coordination will occur at the local level.
- » Enhancing each party's understanding of the other's respective services, eligibility criteria, referral processes, and operations.
 - For instance, each party should provide training and education resources for their respective services to the other party to increase timely coordination and decrease process inefficiencies.

Base MOU Template Requirements

Every MOU template contains the following provisions as required under the Contract:

- » **NEW - Definitions.** Sets forth the defined terms used in the MOU, such as the "MCP-Agency Liaison." This section also states that capitalized terms not otherwise defined in the MOU have the meaning ascribed by MCP's Medi-Cal Managed Care Contract.
- » **Services Covered by This MOU.** Describes the services that MCP and the other party must coordinate for Members.
- » **Party Obligations.** Describes each party's provision of services and oversight responsibilities (e.g., each party must designate a point of contact to act as the liaison for coordinating with the other party).
- » **Training and Education.** Requires MCP to provide education to Members and Network Providers about Covered Services and other party's services available. MCP must also train employees who carry out responsibilities under the MOU and, as applicable, Network Providers, Subcontractors and Downstream Subcontractors on the MOU requirements and services provided by the other party. **NEW -This section provides a ramp up period (the length of which is determined by the Parties) for MCPs to ensure their employees who are responsible for performing activities under the MOU are trained on MOU requirements.**

Base MOU Template Requirements

Every MOU template contains the following provisions as required under the Contract:

- » **Referrals.** Requires the parties to refer to each other as appropriate and describes each party's referral pathways. ***NEW – Closed Loop Referral requirements for 2024 are now optional as the policy is still in development.***
- » **Care Coordination.** Describes the policies and procedures for coordinating care between the parties, addressing barriers to care coordination, and ensuring ongoing monitoring and improvement of care coordination.
- » **Quarterly Meetings.** Requires the parties to meet at least quarterly to address care coordination, Quality Improvement (QI) activities, QI outcomes, and systemic and case-specific concerns, and to communicate with others within their organizations about such activities.
 - **NEW - These meetings may be conducted virtually.**
 - **NEW - Within 30 Working Days after each quarterly meeting, MCP must post on its website the date and time the quarterly meetings occurred and, as applicable, distribute to meeting participants a summary of any follow-up action items or corrective changes to processes that are necessary to fulfill MCP's obligations under the Medi-Cal Managed Care Contract and this MOU.**

Base MOU Template Requirements

Every MOU template contains the following provisions as required under the Contract:

- » **Quality Improvement (QI)**. Requires the parties to develop QI activities specifically for oversight of the MOU requirements, including any applicable performance measures and QI initiatives, such as those to prevent duplication of services, as well as reports that track referrals, Member engagement, and service utilization. **NEW - MCP must document these QI activities in its policies and procedures.**
- » **Data Sharing and Confidentiality**. Requires the MCP to have policies and procedure for sharing the minimum data and information necessary to ensure the MOU requirements are met and describes the data and information the other party may share with MCP to improve care coordination and referral processes. Requires the parties to implement policies and procedures for how the minimum necessary information and data (determined by the parties) will be shared in accordance with applicable law. **NEW - The minimum necessary information and data elements to be shared between the Parties are set forth in Exhibit C of the MOU. The Parties must annually review and, if appropriate, update Exhibit C of this MOU to facilitate sharing of information and data.**

Base MOU Template Requirements

Every MOU template contains the following provisions as required under the Contract:

- » **Dispute Resolution.** Describes the policies and procedures for resolving disputes between the parties and the process for bringing the disputes to DHCS (and CDDS as appropriate) when the parties are unable to resolve disputes. **NEW - MCP must, and IHSS should, document the agreed-upon dispute resolution procedures in policies and procedures.**
- » **Disaster Emergency Preparedness.** The parties should have policies and procedures to ensure the continued care coordination for services in the event of a disaster or emergency. **NEW - *This requirement is now optional for 2024.***
- » **NEW - Equal Treatment.** Provides that nothing in the MOU is intended to benefit or prioritize Members over persons who are not Members also receiving services from the other party.
- » **General.** Sets forth additional general contract requirements, such as the requirements that the MCP must publicly post the executed MOU, the MCP must annually review the MOU, and the MOU cannot be delegated.

IHSS MOU Template Requirements

The IHSS MOU template contains the following provisions specific to the MCP relationship with IHSS:

- » **Training and Education.** Requires that MCP collaborate with County to train the MCP-IHSS Liaison on IHSS assessments and referral processes, including training on IHSS referrals for members as part of Transitional Care Service requirements. **NEW - MCP must provide County, Members, and Network Providers with training and/or educational materials on how MCP's Covered Services and any carved-out services (such as IHSS) may be accessed, including during nonbusiness hours.**
- » **Referrals.** Requires that upon IHSS assessments or reassessments of members, IHSS assist members with communicating to MCP any necessary covered services identified for which the member may be eligible and that MCP develop processes in collaboration with IHSS to enhance integration between IHSS and other Medi-Cal/Medicare services.
 - **NEW - For Members who may be eligible to receive IHSS, want IHSS, and are not currently receiving IHSS, MCP must submit Member referrals to IHSS using a patient-centered, shared decision-making process.**
 - **NEW - If MCP learns that a Member who is currently receiving IHSS has a condition that has changed, MCP must advise that Member to contact the County IHSS Office to conduct an eligibility redetermination for IHSS.**

IHSS MOU Template Requirements

The IHSS MOU template contains the following provisions specific to the MCP relationship with IHSS:

- » **Care Coordination and Collaboration.** Requires the parties to ensure (1) there is no duplication of services for members receiving ECM or Community Supports and IHSS; (2) the continuation of PHM services for members receiving IHSS and outreach processes for members receiving IHSS; and (3) that members who transfer from one care setting to another are appropriately referred to IHSS.
 - **NEW - MCP must assess Members transferring from one care setting or level of care to another, such as from a hospital or an SNF to the home or community, and provide IHSS referral information to Members and supporting documentation to County if Members or their Authorized Representatives self-refer to IHSS, as appropriate, as a part of Transitional Care Service requirements in accordance with All County Letter No.: 02-68, All-County Information Notice No.: I-43-06, or any subsequent or superseding guidance.**
 - **NEW - County should provide Members and their Authorized Representatives, with approval of Members, and IHSS, with information on how to obtain MCP's Covered Services, including any Community Supports or care management programs for which they may qualify, such as ECM or CCM.**

MOU Execution Timeline

Date	Requirement
As of 1/1/24	Requirement to Have Executed MOUs Go Live » MCPs submit Executed MOUs on a rolling basis
As of 3/31/24	First Quarterly Report Due » In addition to submitting Executed MOUs on a rolling basis, MCPs submit “best efforts” to execute MOUs for any that are not yet executed
As of 6/30/24	Second Quarterly Report Due (same submission) » MCPs follow the same submission and review process
As of 9/30/24	Third Quarterly Report Due (same submission) » MCPs follow the same submission and review process

Questions?

