

Meeting Minutes

NAVIGATORS PROJECT MONTHLY PARTNER MEETING

Date: Thursday, July 20th, 2023

Time: 11:00 AM – 12:00 PM

Webinar:

ATTENDEES				
○ Sysvanh Kabkeo	○ Brandon Roberts	○ Estephanie Arreola	○ Tina Coulson	Genevrah Saelee
○ Danielle Pinto	○ Alameda	○ Butte	○ Fresno	○ Placer
○ Kern	○ Kings	○ LA DPH	○ Lake	○ Madera
○ Nevada	○ Tulare	○ Orange	○ Placer	○ Riverside
○ San Bernardino	○ San Diego	○ San Luis Obispo	○ San Mateo	○ Stanislaus
○ Trinity	○ Ventura	○ Ampla Health	○ Sacramento Covered	○ Innercare
○ Catholic Charities of California (CCC)	○ Community Service Solutions (CSS)	○ Kaweah Health Foundation	○ Bonita Family Resource Center (BFRC)	○ Marin Community Clinic (MCC)
○ California Coverage and Health Initiative (CCHI)	○ San Francisco Community clinic Consortium	○ Center for Human Development	○ Tuolumne	

11:00 – 11:05 Introductions/Roll Call

11:05 – 11:10 **Project Deliverables**

Reminder that the quarter 4 progress reports and invoices are due July 31st for the performance period of April 2023 through June 2023 (April, 2023 – June, 2023)

- Another reminder, DHCS is requesting all partners to submit a revised budget plan by July 31st
- The revised budget plan should identify the actual amounts expended for FY 1 and
- Any leftover funds should be rolled over into the next FY
- The May Monthly Data Report is Due July 30th
- Deliverables Reporting and Timeliness Expectations
 - Per the Allocation Agreement, project partners may be subject to partial or full loss of the approved Allocation Amount if they fail to produce satisfactory invoices, provide inadequate supporting documents, and/or fail to meet deliverable deadlines, per [Bulletin 2022-05](#)
 - Additionally, not meeting deliverable deadlines can result in a payment withhold until such time that deficiencies are satisfactorily remediated.

11:10 – 11:45

Project Updates

- **Augmentation Process Update**
 - For those who asked for additional funding, you should be receiving your amendment packages this week or early next week.
 - Partners have 60 days from date of issuance to sign and return to DHCS for countersignature.
 - A one-time extension may be granted to partners for “good cause,” which is generally due to circumstances outside of the ability of the partner to control.
 - Additionally, partners may potentially have a partial or full loss of the augmentation if it is not approved timely.
 - Reminder to partners who have to present to their Board of Supervisors (BOS) please work on getting on their calendar ASAP and advise DHCS of the scheduled date
- **Site Visits**
 - As mentioned in our monthly partner meeting on March 16th, DHCS wants to engage individually with all partners to assess their project performance, understand their

specific challenges/concerns, and provide feedback to assist partners in meeting their goals.

- We will begin engaging in site visits with all partners from now until the end of the current fiscal year
- Site visits will be held both in person and virtually, and the partner will be notified of the meeting format when it is being setup
- DHCS will send out a site visit notification letter at least two weeks in advance to coordinate schedules

- **Navigators Project – Medi-Cal Renewal and Discontinuance Lists**

- Last meeting we presented the CMS Call to Action concern.
- During the meeting, we advised partners that DHCS will be sending out a renewal list to CBO partners
- However, after internal discussions DHCS decided to provide the renewal list to all project partners (county and CBOs) to ensure this effort is implemented across all counties.
- On Friday, July 14th, DHCS notified all project partners that the first Renewal List was made available to all partners via SFTP.
- Partners who currently do not have access to the SFTP, a separate email was sent
- In addition, DHCS provided all project partners with [Bulletin 2023- 005](#)- Support For Medi-Cal Disenrollment During the Unwinding of the Continuous Coverage Requirement and made it available on the Navigators Project website.
- The Bulletin outlines the process, guidance and partner responsibilities to successfully implement this effort.
- Some frequently asked questions we have received from partners since issuing the bulletin and providing the renewal list:
- **How soon should partners expect to receive the discontinued list?** - At this time, we are still waiting for the list and will need to make sure all the information we need is included on the list. We anticipate being able to provide partners the list the week of July 24th being the

earliest but are aiming for the first week of August. [Note: The June 2023 Discontinuance List was provided to partners on July 24, 2023.]

- **Are County partners able to generate this report using CalSAWS system and use our own report to follow up with households that were discontinued or at risk of being discontinued?** - Yes, partners can leverage their access to CalSAWS and generate their own report. However, if partners are sharing the list with any subcontractors please do adhere to the Privacy and Security Agreement (PSA) and/or the Business Associate Addendum (BAA) guidelines.
- **How soon can partners expect the other Bulletin that outlines additional guidance on tracking and reporting?**
 - DHCS is currently working on this guidance and will provide it as soon as possible. At this time we do not have an estimated timeframe [Note: Follow-up [Bulletin 2023-006](#) was sent to all partners via email on July 25, 2023 and is available on the Navigators webpage.]
- **Do partners track or count these efforts?**
 - Per [Bulletin 2023-005](#), partners are required to track and add counts regarding (DP3) outreach, (DP 8) assistance with redetermination, and/or (DP 2) retention data points depending on the activity completed by the partners regarding the lists. These efforts should be counted on Tab 2 and/or Tab 3 on monthly data report [Note: Additional guidance for collecting and reporting data is available via [Bulletin 2023-006](#).]

Navigators Project Awareness

- Community Awareness
 - DHCS is asking partners to assess your community's current level of awareness about the program and enhance visibility to the community where needed
 - Public Visibility can be in Various Forums (news, social media, etc.)
 - For example, refresh content on social media, participate and engage in online conversations through established platforms, etc.

1150 – 11:55

Upcoming Meeting Information

- Quarterly Stakeholder Meeting, August 7th: DHCS is open to any recommended topics
- There will be a Stakeholder pre-meet, on July 25th, with select County and CBO partners and an advocate representative to discuss potential topics for the upcoming stakeholder meeting

11:55 – 12:00

Q&A

Q: Can individuals renew their Medi-Cal if they lose their renewal package? Can they download the form online and fill in the information?

A: Yes, but contact their local County social services office or check the webpage of those respective Counties to see what is available; our team will confirm. The renewal list bulletin ([Bulletin 2023-005](#)) mentions that if there is a missing renewal packet individuals can request a copy through BenefitsCal Portal or they can call the County if the portal is not an option.

Q: How are these lists being divided between the County and CBOs?

A: Partners will receive a list separated out by the County they were awarded to implement and are participating in. For example, if the partner is participating in Alameda County, then they will only receive a list of Medi-Cal members in Alameda County. If the partner was awarded for multiple counties, they should receive a list for all the counties they are participating in. For counties with dual partners (county and CBO partners participating in the same county), DHCS is dividing the list in half so each partner will only be getting a portion of the full list. This is to minimize duplication of efforts.

Q: Do partners not have to work with other funded partners in our County to ensure we aren't making duplicate calls?

A: We always encourage collaboration between partners in dual counties, as well as when partners want to reach out to peer entities and incorporate tried-and-true approaches to their work efforts.

DHCS is dividing the list in half so each partner will only be getting a portion of the full list. This is to minimize duplication of efforts.

Q: Where do partners locate the list?

A: All lists are provided to partners through their SFTP. For those who currently do not have access, the list was provided via a secure email. Please check the SFTP folder, if partners have trouble accessing it. The document is titled "Renewal List".

Q: Center for Human Development (CHD) was under the impression that the List(s) sent included both the upcoming due renewals and the discontinued ones in two different tabs?

A: At this time, only the Renewal List was sent out. DHCS is working on the Discontinued List and partners will be notified when that list is sent out. [Note: The Discontinued List was provided to partners on July 24, 2023 and placed in their SFTP folders.]

Q: Center for Human Development (CHD) received over 8,000 leads, do they have to complete the outreach by the end of August?

A: DHCS recommends using technology or whatever is available to partners including snail mail or mass mailing. DHCS is expecting partners to use the list to the fullest of their ability and attempt contact with everyone on the list as possible, especially the Outreach piece of it.

Q: CHD also received a list from Contra Costa Health Services, is there a possibility of duplicates between the two?

A: Yes, there is a possibility of duplicates between both lists. DHCS recommends partners compare and assess any additional lists to the one the Navigators Project provides to maximize efforts.

Q: Because the list was on an individual level, was there consideration to ensure the split was done based on case number?

A: The case number is not available and the split was done just at the list level.

Q: Is it okay to send post cards?

A: Yes, partners are encouraged to use their creativity when reaching out. Be judicious with the money when spending to do what is more effective in that area.

Q: Can DHCS advise Counties & CBOs how to identify household applicant (case name) to avoid making multiple calls for one household or making phone calls to children?

A: One suggestion is leveraging PivotTables in Excel, which will allow partners to sort by address first. This will allow partners to identify individuals within the same location. Partners can then research and use the email and phone numbers to best identify the appropriate household applicant (individuals 18 or older).

Q: Is there a day that the list will be in SFTP each month?

A: The lists will be provided as soon as possible. At this time there is not a set date that each list will be provided to partners. However, the Renewal List should be available around the beginning of the month. DHCS is working to establish a routine deliverable date for the Discontinuance List and will provide that information when it is available.

Q: Were there any considerations for staff number and size taken into account when dividing the lists? For example, one of Catholic Charities agencies has three contracted staff but over 15,000 clients were assigned to them.

A: No, DHCS wanted to get the list out as quickly as possible. The lists were provided to partners based off the county(ies) they were awarded for and participate in. For counties that only have one partner implementing work efforts, the whole list was provided to just that one partner. For counties that have two partners implementing in, we will split the list in half. DHCS did not factor in staff numbers or resources.

Q: Are partners required to contact everyone on both the Discontinued and Renewal list?

A: DHCS is expecting partners to use the list to the fullest of your ability and attempt contact with everyone on the list as possible, especially the Outreach piece of it. DHCS strongly encourages partners to maximize the federal flexibilities that were granted

during the Continuous Coverage Unwinding period and leverage mass communication efforts (such as mass email, text message, or robo-call campaigns), which are allowable through May 31, 2024.

Q: Will partners be able to see all the reports that were uploaded? We only see one and Orange has 3 CBOs.

A: The Navigators Project split the whole list for Medi-Cal members in Orange County in half and provided one half to the Orange County Social Services Agency project partner and the other half to Catholic Charities, the other partner awarded and implementing in the Orange County service area. The intent on splitting the lists is to avoid duplication of efforts between both partners and maximize the potential contact to all individuals on the lists. As Orange County requested, DHCS will provide the entire list to ensure that the county does not internally duplicate work efforts. If a county welfare department is willing and able to create your own renewal and discontinued lists, you are permitted to use them in lieu of what DHCS sends to partners each month.

Q: Will partners get an email when the lists are posted?

A: Partners will be notified by email when the lists are available.

Q: “Why did you not return the packet?” This is the first question on the list. What do partners do if individuals say that they returned the packet?

A: Mark the packet as returned and count them as ‘Redetermination Assistance’. DHCS will provide guidance for partners but when reporting this data, it is on Outreach, Redetermination Assistance, and Retention. [Bulletin 2023-006](#) provides further guidance on the additional questions.

Q: The Medi-Cal Renewal (MCRE) packets can be completed through the telephone with an electronic signature through the county. Can CBOs provide this option to beneficiaries, or would they have to provide this option by giving the beneficiary the county's phone number?

A: The option for telephonic signature is only available through the client contacting the county by telephone and the county using its processes to record/document the information and signature. The county’s telephone number is printed on the paper renewal form

that is mailed to the Medi-Cal member. CBOs cannot assist in completing telephonic renewals with an electronic signature. However, CBOs can assist in encouraging clients to complete renewal timely and advising them to respond by online if they have an account at BenefitsCal or CoveredCA.com, and by mail, by phone, or in person at the county office.

Q: Are there any updates on the aggregated data template? Or should partners use the old template for May data and enter PHE and normal operations separate?

A: As of right now the revised template has not been sent out. Please continue to use the original template. We will touch bases when we plan to send it out. In regard to separating the PHE from normal operations; DHCS can internally separate based on the time frame. Partners do not have to separate and report on both the PHE and normal tables. Partners can use the Normal Operations table to report this information. [Note: DHCS sent the new Monthly Data Template to all partners on July 31, 2023.]

Q: Can partners continue receiving these lists beyond next year when the "unwinding process" is finished, but renewals and disenrollments will continue. A: No, as mentioned in [Bulletin 2023-005](#), these lists were provided as part of the unwinding process and can only provide them up to May 2024 for the June 2024 renewal period. Please do note that partners **will not** be able to retain data from these lists for permanent purposes and all of the lists and data provided on them will need to be destroyed by June 1, 2024, as the lists are only for the specific focus on the end of the Continuous Coverage Unwinding work efforts. Partners should add a flag or indicator to remind them to destroy the lists when the unwinding period ends.

Q: Does DHCS have the information for that event in LA County? Riverside would like to observe. A: Yes, DHCS can provide the information. We just need to work with the Communications office to make it available to everyone via the Navigators website. [Note: The Navigators Project has released [Bulletin 2023-007](#) on July 25, 2023 to provide partners with instructions on how to get this information posted to the Navigators Project website.]

Q: Are partners required to start submitting these lists back right away? I need to take this back for internal discussion to fully determine how and if Alameda can work on this list on top of other lists DHCS/SAWS is sending out related to the unwinding. Alameda County is also close to CalSAWS migration and an RFP for SB 154.

A: No, do not submit the renewal and discontinued lists back to DHCS. However, the results of the contact efforts need to be reported on the monthly data report. Clarification and detailed guidance is provided on page 3 of [Bulletin 2023-005](#). Further guidance on the additional questions that need to be asked is provide on [Bulletin 2023-006](#).

Next Meeting: Thursday, August 17th, 2023

NOTE:

For individuals with disabilities, DHCS will provide free assistive devices, including language and sign-language interpretation, real-time captioning, note takers, reading or writing assistance, and conversion of training or meeting materials into braille, large print, audio, or electronic format. To request alternative format or language services, please call or write:

Department of Health Care Services
Health Enrollment Navigators Project 1501
Capitol Avenue, Sacramento, CA 95814
healthnavigators@dhcs.ca.gov

Please note that the range of assistive services available may be limited if requests are received less than ten working days prior to the meeting or event.