Meeting Minutes

NAVIGATORS PROJECT MONTHLY PARTNER MEETING

Date: Thursday, March 21, 2024

Time: 11:00 AM – 12:00 PM

Attendees				
Sysvanh Kabkeo	Brandon Roberts	Nancy Ojeda	Tina Coulson	Estephanie Arreola
Genevrah Saelee	Damitra Hawkins	Mario Ortega Jr	Alameda	Butte
Fresno	Kern	Kings	Los Angeles – Dept of Public Health (LA DPH)	Madera
Merced	Orange	Placer	Riverside	San Bernardino
San Diego	San Luis Obispo	San Mateo	San Mateo	Trinity
Tuolumne	Ventura	Ampla Health	Bonita Family Resource Center (BFRC)	California Coverage and Health Initiative (CCHI)
Catholic Charities of California	Community Service Solutions	Community HealthWorks	Innercare	Kaweah Health Foundation
Marin Community Clinic	San Francisco Community Clinic Consortium	California Primary Care Association (CPCA)		

Time		
11:00 – 11:05	**Introductions/Roll Call**
	• New Navigators Analysts – Mario Ortega Jr
11:05 – 11:20	**Project Deliverables and Reminders**
	• DHCS wants to give Kudos to all the partners regarding their efforts and assistance with the end of Continuous Coverage requirement unwind. California's Ex Parté rate had a huge

improvement, and we appreciate partners shift in focus to the renewal activities during this time.

- Partner Community Events
    - o As mentioned in previous partner meetings, DHCS is providing all project partners with the reminder that there is an ongoing opportunity to have their local events posted on the Navigators Website under the [Partner Community Events](#) section.
    - o DHCS is requesting all project partners to continue providing DHCS with any upcoming events. These events do not have to be hosted by a partner; they can be events that a partner is going to attend.
    - o DHCS will routinely post information as it becomes available, providing a three-month view of these events.
    - o We are currently requesting any upcoming events for March, April, May. If you are aware of upcoming events for later months, please send that information to us and we will post once the month is displayed.
- Partner Best Practices
    - o On March 5th, DHCS provided all project partners summaries of best practices for each data point.
    - o The best practices are for partner use only. DHCS is working on the best approach on how to publish this information for public consumption.
    - o Our intent to provide all project partners with best practices was an effort to assist and support partners who would like to try new approaches or activities to assist with their project efforts and/or possibly increase their goals for specific data points.
- January 2024 Data Month file
    - o Due March 31, 2024, via the SFTP. If you have issues accessing the SFTP, please notify your assigned analyst.
- Updated Monthly Data Report (MDR) Template - Data Discrepancies
    - o Currently, our team is in the process of reviewing all of the partner data submitted for SB 154, from October 2022 to date December 2023.

- Upon reviewing all the prior data submitted with the previous monthly data report template as well as the current data submitted with the updated template, our team continues to see common discrepancies when completing the report.
- Though we have gone over these discrepancies in prior partner meetings, we are continuing to see errors.
- We want to remind all project partners that before submitting the report to DHCS, please review the report to ensure the report is completed with the minimum required information and accurately.
- For partners who submitted reports with discrepancies, we will return to the partner for immediate clean up and corrections.
- It is important that partners submit accurate reports to avoid causing delays to DHCS' internal tracking and reporting requirements.
- The most common discrepancies are:
  - The partner is not indicating a data point of either enrolled or retained for the individuals identified on the enrollment and retention tab.
  - Partners are modifying or changing the template by adding columns or changing the layout.
  - Leaving the demographic section completely empty
  - Inputting an incorrect assistance date
  - The enrollment and retention totals are not adding up to the aggregate data totals, and
  - Submitting duplicates within the same month or from months prior
- **Not Indicating Enrolled or Retained:** Per the monthly data report instructions, partners are required to indicate if the individuals identified on 'Enrollment and Retention' tab are either enrolled or retained for the reporting month, only one can be true in the same month. Some partners are still indicating both enrolled and retained for the individual or leaving it completely blank. If the partner does not indicate if the individual

is enrolled or retained, they will not receive credit and the report will be returned back to the partner.

o **Modifying the Template:** Some partners are continuing to modify or change the template by adding additional columns, tabs, or changing the layout entirely. We understand partners have their subcontractors utilize the monthly data report template to assist with outreach efforts, tracking, etc. However, if columns are added to assist the partner for internal tracking purposes, the project partner is required to review the report and ensure the report is clean and accurate before submitting by removing any additional information or columns that they added.

o **Demographics:** Some partners are submitting reports without identifying demographics. Though these are not required fields, DHCS is expecting all partners to make their best effort in gathering the demographic information by asking the individual directly, pulling the information on the application, or pulling the information from internal systems. If the individual encountered does not want to answer or did not report, partners should state the individual did not answer or did not state in the appropriate column, that way we can acknowledge the effort was made.

o **Wrong Assistance Date:** Per the monthly data report instructions, 'Assistance Date' for enrollment, would be the date the Medi-Cal application was completed by the partner or submitted to the county by the partner. For retention, 'Assistance Date' would be the date the renewal package was completed by the partner or the date it was submitted to the county by the partner. DHCS is receiving monthly data reports with incorrect assistance dates. For example, the October 2023 monthly data report is listing 06/01/2016 for a retention record. Or listing an assistance date of November 2023 on the October 2023 data report. Individuals assisted in November should be on the November report not the October report. An assistance date for previous months is acceptable because it may take time for the partner to confirm the

individual's eligibility status. If the partner is reporting the wrong assistance date, the report will be sent back to the partner for clean-up.

- o **Data Does Not Align with 'Aggregate' Totals:** DHCS is finding that some partners are providing incorrect enrollment or retained aggregative data totals. For example, on the 'Enrollment and Retention' tab the partner shows that they enrolled 4 individuals and retained 3 individuals. However, on the aggregative data table the partner put that they enrolled 10 individuals and retained 8 individuals. DHCS is utilizing the actuals that are listed on the Enrollment and Retention tab, as it appropriately reflects who was successfully enrolled or retained. We want partners to be aware of this discrepancy because when reviewing your actuals-to-date with your assigned analyst for the fiscal year or the reporting month, your actuals may be different from what DHCS is tracking. Please make sure you are adding your enrollment and retention numbers correctly and matching that number on your aggregate tab.
- o **Duplicative Data:** As mentioned earlier, DHCS is reviewing all the data submitted from this iteration. For partners to understand our internal process, DHCS is taking the data that is submitted by the partner and consolidating it onto one report. At that time DHCS is making sure all the required fields are completed and filled out correctly. While reviewing the consolidated report as a whole, we are noticing two different scenarios of duplicative data.
  - First Scenario: DHCS is seeing partners submit duplicative data within the same reporting month. Sometimes the person is listed on the report more than once. Therefore, when the partner is adding the number of individuals they enrolled or retained, that total on the aggregative number reported is higher as individuals are being counted more than once. Individuals should not be listed more than once on the template. If the partner does have

duplicative date for the reporting month, the report will be sent back to the partner.

- Second Scenario: We are finding that partners are reporting the same individual for different reporting months, but the individual has either the same outcome of enrolled or retained or the individual was enrolled in one month and then 3 months later the same individual is now retained. If we see this, both reports will be returned back to the partner to clean up, correct, and verify the appropriate eligibility status.

- DHCS would like to advise partners that upon identification of duplicate records on partner's data reports, a consolidated file containing all monthly data submitted will be returned to the partners for corrections.

- DHCS will give all partners a file return date. Due to reporting requirements, please be aware that the turn around window may be shorter than anticipated.

- Additionally, DHCS is requiring all partners to clean up the consolidated file that is sent to them and that partners return the same file with the cleaned-up data and in the same format as DHCS sent it. DHCS will not reconcile the returned files against the original file for the partners. This means that what you return to us will be what is being counted for all data points covered during the period.

- In relation to reviewing the data and identifying duplicate records, the previous monthly data report templates were asking for the SSN and/or CIN, our team was able to detect those duplicates based on these unique identifiers.

- However, now that the updated template does not require unique identifiers, it is harder for us to track if there are any duplicates.

- For this reason and more, DHCS is adding the date of birth field back into the monthly data

report, as it was unintentionally deleted when we removed the CIN and SSN fields.

- The updated template will be emailed out to partners by the end of the week.
- This new version will be required for the April 2024 data month forward.
- The April 2024 data month's report will be due June 30, 2024.
- Dependent of a full data review, DHCS may need to add this field back onto the template retroactively, meaning we would ask partners to resubmit their monthly reports for data months November 2023 through March 2024.
- At this time, we are going to ask partners to answer a poll to assess partners ability to provide the DOB for past monthly data report.
- DHCS will review the poll results and determine our request based upon the responses.
- Poll results show that a majority of project partners stated they are able to provide the DOB for past monthly data reports. DHCS will assess on how to obtain the DOB for the November 2023 through March 2024 data months.

11:20 – 11:30 **Data Collection**

- AB 74 Data's Publication Update
  - As mentioned in our previous partner meetings, DHCS has consolidated and put together a dashboard for the AB 74 data that partners submitted.
  - This AB74 Data Dashboard is now available on the Navigators Project website in the Partner Section.
  - The data shares a broad level of data that includes written language, spoken language, sex, age brackets, and a few other comprehensive items.
  - This high-level report gives a glance of what was completed during AB 74 and is what we intend to share for this SB154 iteration.
  - As mentioned earlier, we want to stress the importance to all project partners to submit clean and accurate

11:30 - 11:40

    data to assist our team with reporting this information correctly and timely.

     o DHCS will be providing AB 74 partners with an individual dashboard summary for AB 74. The dashboard summary will show each individual partner and their performance. We acknowledge that there may be some discrepancies.

      ▪ This dashboard was sent to partners on 4/28.

Site Visits

- DHCS has begun scheduling partner virtual site visits.
- DHCS will send a site visit notification letter, notifying the partner of the intended week to schedule the site visit.
- Once scheduled, DHCS will provide the partner with the site visit agenda.
- This site visit will focus on the partners performance efforts for fiscal year (FY) 2, gather more information on partner's infrastructure and efforts, and discuss the intended efforts for FY 3.
- DHCS encourages partners to review the agenda to gather the appropriate information and/or invite any subcontractor(s) to share about their activities.

11:40 – 11:50   **Quarterly Stakeholder Meeting**

- On Monday, February 5th, the DHCS Navigators Team hosted another Quarterly Stakeholder meeting for the Navigators Project.
- DHCS would like to thank partners and their subcontractors who shared during the meeting.
- DHCS would like partners to be aware that a request for partners and their subcontractors to continue to share their efforts, successes, and challenges, may be requested for the next quarterly stakeholder meeting.
- DHCS is interested to hear any feedback from project partners on the previous Stakeholder meeting.
  - Did any project partners join the breakout room to hear the meeting in Spanish or know anyone who did? How was it?
  - Do the project partners have any feedback on the topics or talking points that were shared.
  - Anything DHCS can take away from the meeting and consider for the next meeting.
- To attend the upcoming Stakeholder Meeting on May 6th,

partners and/or partner subcontractors will need to register to attend the meeting. The [registration link](#) can be found on the Navigators Website in the [Stakeholder and Advocate Communication section](#).

11:50 – 12:00   **Q&A**

Q: If an individual is an inter-county transfer (ICT) would it be retained instead of enrolled if assisted through the project?
A: If a partner assists a Medi-Cal member in any way during the ICT process, they should mark the DP as appropriate. Both the partners (i.e., the county losing the Medi-Cal member and the county receiving the Medi-Cal member) would mark DP 7 Troubleshooting in order to get credit for their work efforts. If the partner receiving the ICT is required to engage in an eligibility determination to maintain benefits, then the partner would mark the appropriate additional DP(s) to get the credit for their work efforts.

Q: With an ICT Medi-Cal Coverage should not end. Why would we count this as retained if we are not assisting with a Medi-Cal Renewal? Would the county assisting with the Medi-Cal Renewal count it as retained, there is a Medi-Cal Renewal completed during the ICT process?
A: See response to prior question.

Q: Our county is taking more than 60 days, so what do we do then?
A: In previous monthly partner meetings, DHCS has addressed how to submit data when a project partner is not able to confirm status by the time the monthly data report is due. Please refer to previous meeting minutes that are published on the [Navigators Project website](#). To answer, partners are asked to hold onto those individual's information and once the project partner is able to confirm eligibility status, enrolled or retained, the individual can be submitted on the following monthly data report. Do keep the assistance data accurate.

Q: Would we be able to add formulas to have those cells linked in the spreadsheet?

A: Partners must submit the Monthly Data Report (MDR) in the same format and layout as it has been provided to all partners by DHCS. However, if partners need to add formulas, columns, data that has not been confirmed for tracking purposes, and utilize the template as they need to, they must remember to clean it up and remove any manipulations to the format **prior to** submitting it back to DHCS.

Q: For the family members who have the same name but different birthdate, how should they be reported as they may look like a duplicated individual on the report?
A: DHCS is aware that the current monthly data report template does not require unique identifiers, which is harder for DHCS to track if there are any duplicates. Therefore, DHCS is adding the 'Date of Birth' field back into the monthly data report, as it was unintentionally deleted when we removed the CIN and SSN fields. An updated template, with this added field, will be emailed out to partners by the end of the week. The updated monthly data template will be required for the April 2024 data month forward. The April 2024 data report will be due June 30, 2024.

Q: Would DHCS consider developing/providing a MS Access or other universal tool/databases that would eliminate or severely reduce these errors?
A: DHCS would be interested in this kind of resource to help out with data reporting. However, this may not be available or approved to DHCS until sometime after the project ends.

Q: Here in Los Angeles, research shows that individuals who are uninsured (often homeless or new immigrants) and walk in for assistance or are transported to a hospital, agreed to be enrolled in "Emergency Medi-Cal" for a month (new enrollment) and then are retained into full scope Medi-Cal within about 6 weeks. Therefore, in our reports they show up twice, one as a new enrollment and one as a retained Medi-Cal subscriber? Would this scenario be considered a duplicate?
A: No, this is not considered a duplicate. Individuals that receive active, temporary benefits through any type of Presumptive Eligibility can be counted as "enrolled" by the partner. Should the individual obtain benefits via a full eligibility determination, that

same individual can subsequently be counted as "enrolled" by the partner.

Q: I noticed in the current Monthly Data Template for the demographic fields, there isn't an option for Hispanic or Latino in the values for the 'Race' field. Is this an error?
A: All demographic fields are open-ended, and things can be added if the dropdown menus do not have the options available.

Q: If an individual gets discontinued for whatever reason under 1 year and they either reapply or corrects the issue and gets reactivated several months down the line, will they show up on your end as a duplicate?
A: If an individual corrects the deficiency so that their coverage can be restored back to the date of discontinuance (no break in coverage), then they should be counted as "retained." If an individual eventually corrects the deficiency, but there was a break in coverage (they cannot get their benefits retroactively restored), then they should be counted as "enrolled." If a partner encounters a situation that does not fit into this guidance, please contact your Navigators Project liaison for further guidance.

Q: Would we be able to count change in circumstance renewals within the same year as enrollment under Data Point 2?
A: Yes, if a renewal process is completed, please do count toward Data Point 2: Retention and Data Point 8: Redetermination Assistance as applicable.

Q: Is DHCS planning on press/media promotion around the dashboard data?
A: Not at this time. However, it was announced in the weekly DHCS Stakeholder Update announcements that goes out publicly every Friday afternoon. Additionally, DHCS has already received some questions and interest that we are fielding at our level, so do not be surprised if partners get some interest at your level.

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.