



# Medi-Cal Health Enrollment Navigators Project (Navigators Project) - Phase IV -

Department of Health Care Services  
Medi-Cal Eligibility Division  
December 2020



# Navigators Project Background

- Established on July 1, 2019 as part of the 2019 Budget Act (AB 74).
- \$59.7 million (50% State General Fund and 50% Federal Trust Funds) available for State Fiscal Years (SFYs) 2019-20 through 2021-22.
- Project implementation and funds for County and Community Based Organization (CBO) activities in Phase IV are available from 1/1/21 to 3/31/22.
- Supports “navigation services” which are activities related to outreach, enrollment, retention, and utilization assistance.
- Awarded organizations are able to claim funding only upon DHCS counter-signature of the allocation agreement.
  - Through Phase III, DHCS approved 32 counties and nine CBOs (serving 20 counties) to provide Navigators Project services within 52 counties.
  - Navigators Project funds allocated to date is approximately \$51.5M; approximately \$8.2M remain available for allocation in Phase IV.



# Phase IV Goal

The goal of Phase IV is to award funding to a CBO within each of the six (6) un-awarded counties (listed below), with a preference to those entities that: currently provide local navigation services to vulnerable populations, have an existing relationship with a county welfare department, and have established infrastructure and/or capability for a rapid implementation of the work plan.

1. Alpine
2. Inyo
3. Mendocino
4. Modoc
5. San Francisco
6. Sierra



# Phase IV Goal Cont.

## Additional Available Counties

- Another goal of Phase IV is allowing a dual partnership within the counties listed below. The objective of a dual partnership is to fill in any existing gaps by conducting navigation services to vulnerable target populations. If awarded, your organization would work alongside the current project partner, however, your agreement will be with DHCS.
1. Amador
  2. Calaveras
  3. Del Norte
  4. Imperial
  5. Kern
  6. Lake
  7. Lassen
  8. Los Angeles
  9. Mariposa
  10. Mono
  11. Monterey
  12. Nevada
  13. San Bernardino
  14. San Joaquin
  15. Santa Cruz
  16. Siskiyou
  17. Solano
  18. Sonoma
  19. Stanislaus
  20. Trinity
  21. Tulare
  22. Tuolumne
  23. Yuba



# Definitions

- For purposes of this Project, the following terms are defined:
  - **Enrolled:** Individuals enrolled into Medi-Cal as a direct result of being educated by or receiving assistance from the Navigators Project. Enrollment is the focus of the Health Navigators project.
  - **Retained:** Individuals' Medi-Cal eligibility and ongoing benefits continue as a direct result of the Navigators Project.
  - **Outreach:** Individuals being informed or educated about the Medi-Cal Program including how to apply for and keep Medi-Cal benefits, if eligible.
  - **Assisted with Application:** Individuals receiving assistance on how to apply for Medi-Cal, fill out an application, and/or submit required substantiating documentation.



# Definitions (continued)

- **Assisted with Accessing & Utilizing Health Care Services:** Medi-Cal recipients receiving assistance in accessing and utilizing health care services such as dental or medical office visits or routine medical care.
- **Assisted with Troubleshooting:** Individuals receiving assistance on Medi-Cal eligibility problems or case management issues in order to keep their on-going Medi-Cal benefits. This assistance may include Medi-Cal renewal or re-determination related services provided by the Navigators Project, as well Inter-County Transfer cases.
- **Assisted with Redetermination:** Individuals receiving assistance on how to re-apply for Medi-Cal, fill out an application, and/or submit required substantiating documentation. Due to the Public Health Emergency (PHE), current DHCS guidance instructs counties to delay the processing of Medi-Cal annual redeterminations, discontinuances, and negative actions for Medi-Cal, through the duration of the PHE.



# Target Populations

While AB 74 gives flexibility in which populations to focus navigation efforts, interested partners of the Navigators Project should consider the following 11 groups. Partners may identify additional target populations outside of the following:

- Persons with mental health disorder needs
- Persons with substance use disorder needs
- Persons with other disabilities
- Aged Persons
- Persons who are homeless
- Young people of color
- Immigrants and families with mixed immigration status
- Persons with limited English proficiency
- Low-Wage workers and their Families
- Uninsured children or youth formerly enrolled in Medi-Cal
- Persons who are in county jail, in state prison, on state parole, on county probation, or under post-release community supervision



# Data Requirements

If chosen as a recipient for the Navigators Project funding, DHCS will require monthly data and quarterly performance reports to be submitted. Required data elements to be reported are the following:

1. Number of persons enrolled (monthly)
2. Number of persons retained (monthly)
3. Number of persons reached (quarterly)
4. Number of persons assisted with an application (quarterly)
5. Number of persons assisted with accessing and utilizing health care services (quarterly)
6. Number of persons assisted with troubleshooting (quarterly)
7. Number of persons assisted with redetermination (quarterly)





# Navigators Project Activities - Enrollment

## Permissible Activities

- Enrollment
  - Translation activities towards 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
  - Workload gathered during outreach efforts

## Excluded Activities

- Enrollment
  - Case processing for eligibility determinations or terminations, unless these activities will be included as required duties and responsibilities of a designated Navigators Project staff



# Navigators Project Activities - Retention

## Permissible Activities

- Retention
  - Cold calls/outreach to beneficiaries due for redetermination
  - Cold calls/outreach to beneficiaries who have been discontinued during redetermination

## Excluded Activities

- Retention
  - Case processing for eligibility determinations or terminations, unless these activities will be included as required duties and responsibilities of a designated Navigators Project staff



# Navigators Project Activities - Navigation

## Permissible Activities

- Navigation
  - Translation activities towards enrollment or navigation services
  - On-site resource during outreach efforts
  - Assistance in assessing the best program options and identifying medical providers
  - Coordinate mental, medical and dental care visits

## Excluded Activities

- Navigation
  - Provide transportation services to mental, medical, and dental care visits



# Program Requirements

In order to be considered for an award, your organization must complete and submit the following documents to the Health Navigators Project at [HealthNavigators@dhcs.ca.gov](mailto:HealthNavigators@dhcs.ca.gov)

1. Application Questionnaire
2. Application Attachment 1: Navigator Goals and Objectives
3. Application Attachment 2: Work Plan
4. Application Attachment 3: Budget Plan
5. Organizational Chart
6. Support letter(s) from a county welfare department in the proposed county or counties.



# Health Navigators Project Questionnaire

Complete and submit a questionnaire by describing the experience of your organization with the following:

- Medi-Cal applications, enrollment, and redeterminations.
- Overall troubleshooting Medi-Cal case situations.
- Experience as a health navigator.
- If your organization is currently engaged in Medi-Cal navigation efforts.
- Current working relationship or presence in the county you are applying for.



# Navigation Goals and Objectives (Attachment 1)

Complete and submit your Goals and Objectives for the project by identifying the following:

- County or counties your organization intends to serve.
- Vulnerable target population(s) needing Medi-Cal services in your community.
- Number of individuals your organization anticipates to enroll and retain in the specific county or counties.
- Provide a detailed summary of how your organization plans to reach the targeted populations.



# Work Plan (Attachment 2)

Complete and submit a Work Plan identifying specific steps on how your organization intends to implement this project.

- Identify creative strategies to engage and outreach to your identified target population(s).
- Identify creative strategies to retain your identified target population(s).
- Identify your estimated enrolled/retained numbers.



# Health Navigators Project Budget Plan (Attachment 3)

Complete and submit a budget plan outlining your projected budget amounts for the following Fiscal Years of this project:

- Fiscal Year 2 (agreement execution date when countersigned by DHCS through June 30, 2021).
- Fiscal Year 3 (July 1, 2021 through March 31, 2022).
- Provide an overall total amount of funding your organization needs to implement the Navigators Project from your anticipated start date until the project end date (3/31/22).
- Invoices are submitted on a quarterly basis.





# Project Due Dates and Timeline

- Proposal submission is on a “first-come, first-served” basis.
- Phase IV will remain open until all remaining project funding is allocated.
- If awarded, an Award Letter and Allocation Agreement will be sent to your organization.
- Once the agreement is executed by your organization, return the agreement to DHCS for a counter signature.
- Project implementation (and billable activities) can start the date the agreement is countersigned by DHCS.
- Your organization will be assigned a Navigators Project Analyst to assist you through the Allocation Agreement process, as well as work closely with you on all required project documentation including data, invoices, and progress reports.



# Frequently Asked Questions (FAQs)

1. Is there a limit on the proposed budget amount?
  - Submit a reasonable budget amount that fits the needs of your organization in order to successfully implement this project.
  
2. Can a proposal be submitted for more than one county or a county that is already covered?
  - DHCS's overall goal is to allocate all funding and preferably cover every remaining un-awarded county and provide additional assistance in counties as noted.



## FAQ'S (cont'd)

3. How long will we have to implement this project?
  - From the date the allocation agreement is countersigned by DHCS through March 31, 2022.
  
4. Can we serve more than one target population?
  - Yes, you may include as many target populations who are in need of Medi-Cal assistance in your community/county.
  
5. Due to COVID 19, outreach strategies are limited. How do we outreach to our target populations?
  - DHCS encourages all partners to be creative within their communities. Once your proposal is reviewed, DHCS will provide feedback on your creative strategies and approaches.



# DHCS Navigators Project Contact Information

- Email for proposal submission and questions:  
HealthNavigators@dhcs.ca.gov
- Mailing Address for original documents:  
Attn: Health Navigators Project  
Department of Health Care Services  
Medi-Cal Eligibility Division  
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Sacramento, CA 95899-7417