



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

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**DATE:** 03/09/2020  
**TO:** All Participating Counties  
**FROM:** Medi-Cal Health Enrollment Navigators Project (Navigators Project)  
**SUBJECT:** Permissible and Excluded Activities

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:

<b>Activities Under the PSA</b>	
<b>Permissible</b>	<b>Excluded</b>
<p>Enrollment:</p> <ul style="list-style-type: none"><li>- Translation activities towards enrollment or navigation services.</li><li>- On-site resource during outreach efforts.</li><li>- Conduct presentations and educate public at outreach events.</li><li>- Assist the beneficiary or answer questions to help complete an application.</li><li>- Workload gathered during outreach efforts.</li></ul>	<p>Enrollment:</p> <ul style="list-style-type: none"><li>- Case processing for eligibility determinations or terminations, unless these activities will be included as required duties and responsibilities of a designated Navigators Project staff.</li></ul>
<p>Retention:</p> <ul style="list-style-type: none"><li>- Cold calls/outreach to beneficiaries due for redetermination.</li><li>- Cold calls/outreach to beneficiaries who have been discontinued during redetermination, only during the (90) day cure period.</li></ul>	<p>Retention:</p> <ul style="list-style-type: none"><li>- Case processing for eligibility determinations or terminations, unless these activities will be included as required duties and responsibilities of a designated Navigators Project staff.</li></ul>

<b>Activities Under the PSA (continued)</b>	
<b>Permissible</b>	<b>Excluded</b>
Navigation: - Translation activities towards enrollment or navigation services.	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. - 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):

<b>Activities Under the BAA</b>	
<b>Permissible</b>	<b>Excluded</b>
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.