



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

Department of Health Care Services  
Medi-Cal Eligibility Division  
August 7, 2020



# Navigators Project Background

- Established on July 1, 2019 as part of the 2019 Budget Act (AB 74).
- \$59.7 million (50 percent state General Fund and 50 percent 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 available 1/1/20 to 12/31/21.
- 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.
  - In Phases I & II, DHCS approved 34 counties and seven CBOs (serving 17 counties) to provide Navigators Project services within those 51 counties.
  - Navigators Project funds allocated thus far total approximately \$49.4M; approximately \$10.6M remain available for distribution in Phase III.



# Phase III Goal

The goal of Phase III is to award funding to a single CBO within each of the seven 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. Contra Costa
3. Inyo
4. Modoc
5. Sierra
6. Sonoma
7. Tulare



# 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.
- **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) by **5:00 p.m. on Monday, August 17, 2020:**

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 applied 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 seven targeted counties included in Phase III.



# 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 December 30, 2021)
- Provide a overall total amount of funding your organization needs to implement the Navigators Project from your anticipated start date until the project end date (12/21/21).
- Invoices are submitted on a quarterly basis.



# Project Due Dates and Timeline

- Q&A Webinar with DHCS: 1:00 p.m. on Friday, August 7, 2020. (time pending)
- Proposal submission due date: No later than 5:00 p.m. on Monday, August 17, 2020.
- 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.





# 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 county. Currently, our focus is to have one entity per county.



## 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 December 31, 2021.
  
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 become creative within their communities. Once DHCS reviews your proposal, DHCS can 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  
PO Box 997417-7417, MS 4607  
Sacramento, CA 95899-7417