PAL Referrals

November 2017
PAL background

- Preferred Assister Lead (PAL) program was launched for OE3 to ensure the MNsure Contact Center could connect consumers in need of in-person assistance with partners able to provide the best quality service.

- MNsure Broker Enrollment Centers and navigator network grantees have served as the Preferred Assisters.

- MNsure Contact Center sends leads as a secure email to the contact designed by the Preferred Assister organization.

- Assisters are expected to follow-up with the consumer as soon as possible.

- MNsure has required various levels of reporting in the past.
Challenges limited the effectiveness of the program:

- Delays in MNsure sending out leads to the assister because of internal manual processes. Consumer may already have contacted the assister, or no longer needs assistance.
- Leads sent to inaccurate or outdated contacts, the wrong type of assister, or an assister in the wrong area of the state.
- Lack of clarity on what type of help the consumer needs.
- Frustration because the Preferred Assister needs to make calls to MNsure to understand the status of the case, or the assister is not the appropriate party to resolve the issue.
- Cumbersome reporting process.
- Delays in resolving preferred assister concerns because there is no identified point of contact within MNsure.
- Some geographic gaps in coverage around the state.
PAL improvements for OE5

- MNsure engaged in a process improvement project over the summer
- Goals for OE5:
  - Increase efficiency/speed of the process
  - Improve the accuracy of referrals
  - Provide more information with the referral
  - Simplify the reporting process
  - Fill geographic gaps
New for OE5

- Important improvements:
  - Leads are sent to the Preferred Assister as soon as they are created – no more delays!
  - Updated internal process to increase appropriate referrals and collect additional case information
  - Improved internal training so that process is followed consistently
  - More information included in the lead email so the assister can more effectively help the consumer
  - Created a single point of contact at MNsure so that preferred assister issues can be resolved quickly
  - Simplified the reporting process by creating a new Preferred Assister Report
PAL policy

- MNsure will provide Preferred Assisters with the following:
  - Consumer leads sent using a secure method that include consumer contact information and relevant information regarding the consumer’s application and/or enrollment status and type of assistance requested.
  - Regular Preferred Assister Reports that document the leads that have been generated.
  - A timely response to requests to update contact information or suspend Preferred Assister activities.
PAL policy

- Preferred Assisters agree to:
  - Contact a consumer as soon as possible, but no later than within one to two business days
  - Have the capacity to complete appointments within two weeks from receiving a referral from MNsure
  - Provide MNsure with a designated contact point for emailing leads and immediately notify MNsure if there is a change to the contact information
  - Complete and return the Preferred Assister Report on a schedule to be determined by MNsure with all required fields filled in
  - Immediately notify MNsure if the Preferred Assister is no longer able to meet any of these expectations
Referral emails

- Representative will identify the appropriate assister type:
  - No application – refer to a preferred navigator
  - Public program determination – refer to a preferred navigator
  - QHP determination – refer to a preferred broker

- Email will include:
  - Does the consumer have an active account?
  - Does the consumer have an active application?
  - What is the household’s current determination(s)?
  - Why is the consumer seeking help from an assister?
  - What guidance was the consumer provided?
  - Did the consumer consent to have their information sent to an assister?
Each organization is required to report back to MNsure what happened to each referral that is sent to them.

MNsure will send a spreadsheet to each organization with the names of consumers that were referred.

MNsure will use reports to help track success of referrals as well as the performance of each preferred assister organization.
Reporting

- Required fields on the report:
  - Contact Made (Y/N): captures whether or not the consumer was contacted
  - Contact Date: captures the month, day and year the consumer referral listed on the report was contacted
  - Resolution: drop down to select the type of resolution
    - Eligible for MA
    - Eligible for MinnesotaCare
    - Enrolled in QHP
    - Eligible for QHP no enrollment
    - No longer needs assistance
    - Referred to another certified assister
    - Unable to contact
    - Assisted with technical issue only
    - Contact made appointment scheduled

- Optional field on the report:
  - Comments: may be used for any notes that may help clarify the outcome of the consumer referral
Reporting rhythm for OE5

- Referrals sent November 1 – November 15
  - MNsure sends report November 22
  - Completed report due back by November 29
- Referrals sent November 16 – November 29
  - MNsure sends report December 6
  - Completed report due back by December 13
- Referrals sent November 30 – December 13
  - MNsure sends report December 20
  - Completed report due back by December 27
- Referrals sent December 14 – December 27
  - MNsure sends report January 3
  - Completed report due back by January 10
- Referrals sent December 28 – January 10
  - MNsure sends report January 17
  - Completed report due back by January 24
Who to contact

- Send an email to assisterleads@mnsure.org to notify MNsure:
  - If there is a change to your designated contact point (email)
  - If you are unable to accept any new leads or can no longer complete appointments within two weeks of receiving a lead
  - For any other question related to the PAL program