Introduction

Welcome

We at MNsure are excited to have you on board as a grantee in our 2018-2019 Navigator Outreach and Enrollment grant program. The grant program is aimed at building a robust infrastructure of regional navigator networks that will help to increase the number of insured Minnesotans, particularly among populations with disproportionately high percentages of uninsured. Grantee organizations have a history of connecting with hard-to-reach populations and will serve as an access point to MNsure and health insurance coverage. Thank you for your partnership in this mission.

Purpose

The purpose of this manual is to keep you informed of policies and procedures for your outreach and enrollment grant contract. This document will be updated as new policies and procedures are developed or refined by MNsure.
**MNsure Contacts**

Below are the people at MNsure you will come into contact with during the grant period.

**MNsure Community Specialist/Grants Manager**

Nachee Lee  
(651) 238-7218 mobile  
(651) 539-2226 desk  
Nachee.Lee@state.mn.us

William Bio  
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William.Bio@state.mn.us

**Consumer Assistance Program Coordinator**  
Rebecca Johnson  
651-539-1980 -desk  
rebecca.e.johnson@state.mn.us

**Marketing & Communications Specialist**  
Marie Harmon  
(651) 539-1961  
Marie.Harmon@state.mn.us

**Sr. Director of Partner and Board Relations**  
Christina Wessel  
(651) 539-2060 desk  
Christina.Wessel@state.mn.us
Communication with MNsure Staff

Scope
This policy applies to management of MNsure Outreach and Enrollment Grants.

Terms and Definitions
- **Outreach and Enrollment Grantee**: A Minnesota organization that received a grant from MNsure to conduct outreach activities and/or provide enrollment assistance to hard-to-reach populations.
- **Primary organization contact**: A staff member from each grantee organization designated by grantee organization to serve as main point person for MNsure on grant-related activities.

Policy Details
The majority of communication with MNsure regarding Outreach and Enrollment Grant work shall go through the MNsure Community Specialist assigned to grantee organization. Each grantee organization will assign a primary organization contact who will serve as the decision maker for the grantee organization. MNsure will communicate with other grantee organization staff as designated by primary organization contact.

Per the contract, if the authorized representative changes at any time during contract, the grantee must notify MNsure in writing within 10 business days.

MNsure will also communicate with grantees through additional channels, as outlined in the communications procedures below. This plan is a general outline of the year and is subject to change, at which point grantees will be notified.

Procedures
1. Complete the Grantee Contact Information List 2018-2019 template provided by Community Specialists outlining which grantee organization staff and/or volunteers should receive which communications from MNsure.
2. As staff leave and/or new staff comes on board, email contact information to assigned Community Specialist.
3. MNsure staff will communicate to grantees via the following communications procedures:
   a. Bi-Annual Site Visits – Community Specialist site visits in September and February/March of the grant year.
   b. [Grantee Resource Page](#) on Assister Central
References and Related Documents
Grantee Contact Information List 2018-2019 Template

General Information
Grantee designee will be responsible for submitting reports and reimbursement requests, participating in calls or meetings with MNsure, ordering and/or having approved collateral materials and keeping grantee organization staff and coalition partners informed.
Marketing and Communications

Scope
This policy applies to management of MNsure Outreach and Enrollment Grants.

Terms and Definitions

- **MNsure Partner Badge:** The MNsure logo available to contracted organizations for use in promotional activities. The logo is available through the Community Specialists or by contacting communications@mnsure.org.

Policy Details

To help with their outreach efforts, MNsure will support grantee organizations through tools including ready-made social media content, a limited number of print collateral materials, PowerPoint and other presentation materials and communications templates.

MNsure will have a few pieces of general MNsure collateral, such as brochures and income guideline handouts, available for grantees to order. Grantees will be contacted by MNsure to obtain an estimate of the quantity needed. These will be printed and made available to grantees based on their needs as well as MNsure’s available budget for printing.

Grantees may create their own communication materials specific to their audience. Grantees should use the MNsure Partner Badge on materials created. Per the grant contract, some materials must be approved by MNsure staff before they may be used, and circumstances are outlined below.

Procedures

**Partner-created materials using the MNsure brand**

1. Partners are permitted to use the MNsure Partner Badge promoting their affiliation with MNsure and availability of services. Prior approval of badge usage is not required in the following circumstances:
   a. Flyers promoting enrollment events and assistance, giveaway items promoting resources, materials for grantee internal organization and staff training purposes, etc.

2. MNsure approval is required for grantee-created materials in the following circumstances:
   a. Materials that include complex eligibility information, materials that include technical policy guidelines, materials that will be used for wide-reaching paid media

3. If material requires prior approval, grantee should contact their MNsure Community Specialist with the following information:
a. Mockup/draft of materials.
b. How these materials will be used (purpose, plan)
c. Who the target audience is for the materials
d. Quantity and timeframe for usage

4. MNsure staff will review the request and respond within 30 business days with approval, edits or denial.

5. If edits are provided, the materials and related information must be resubmitted to MNsure at navigatorgrants@mnsure.org for review and approval.

6. Final versions will be submitted to and retained by MNsure for future reference.

References and Related Documents

- Consumer Release Form for Stories and Marketing Purposes

General Information

When in doubt, ask Community Specialist about material availability, Partner Badge usage and any other marketing or communications ideas.

Material Toolkit

Policy Details

Grantees will be provided a Outreach and Communications Materials Toolkit through the Outreach and Communications Resources section under Grantee Resources on Assister Central to assist and empower grantees in their efforts to engage and educate consumers. This kit may include the following, along with instructions, for grantee use:

Communications and Outreach Materials Toolkit

- Press release, Op-Ed and Letter to Editor templates
- Customizable print advertisements, event flyers and general flyers (inserts, displays, etc.)
- MNsure 101 PowerPoint presentation
- Online story collection tool
Outreach and Events

Scope
This policy applies to management of MNsure Navigator Geographic Grantees.

Terms and Definitions
- Navigator Geographic Grantees: A Minnesota organization that received a grant from MNsure to conduct outreach activities and provide enrollment assistance to hard-to-reach populations.

Policy Details
MNsure will engage grantees in a variety of ways to advance outreach strategies and meet the needs of consumers. Per the contracts with MNsure, grantee organizations are required to work in partnership with MNsure to meet these goals. Any of these communications are to include the Community Specialist assigned to that particular grantee.

Procedures
MNsure may engage grantees in any of the following ways:
- To fulfill external requests for speakers, presenters or enrollment assistance
- To participate in media opportunities
- To coordinate grantee participation in any MNsure outreach and enrollment campaigns
- To identify consumers to share stories
Reporting

Scope
This policy applies to management of MNsure Navigator Enrollment and Outreach Grants.

Policy Details
Grantees must report monthly through the online grants management system (Foundant). The reports are due by the 10th day of each month for activities conducted in the previous month by the grantee and sub-grantee organizations. The final report is due within 30 days of the conclusion of the grant contract period. It must be completed and accepted to receive final payment of the grant award.

Procedures

Monthly Progress Report
- Monthly progress reports and the instructional sheet on how to prepare the reports are available through Foundant for all grantees.
- Each grantee will complete all sections of the report according to their funding area and submit online through Foundant.
- Navigator geographic grantees will complete an additional data collection report and submit through Foundant on or before the 10th day of each month.

Final Report
- Complete form assigned in Foundant. Final report must be received and approved before last invoice process for payment.

References and Related Documents
Monthly Progress Templates
Request for Payment Invoicing

Scope
This policy applies to management of MNsure Outreach and Enrollment Grants.

Policy Details
Grantee organization will receive the grant award through reimbursement payments of grantee expenses by MNsure. Some grantee organizations may also receive an advance payment at the beginning of grant contract cycle for up to one month of their grant contract amount.

Request for Payment Reimbursement requests are due by the 30th of each month as stipulated in the contract. The invoice should include only expenses that were incurred during the previous calendar month. Requests for reimbursement must be submitted through Foundant on the invoice form made available for each grantee.

Errors on an invoice need to be corrected before an invoice is processed for payment.

If an advance payment is received, it must be reconciled within that same fiscal year (recommend within first six months) and in accordance with the deadline included in the grant contract.

Procedures
1. Submit invoice via email to Community Specialist staff.
   a. Project Number – Fill in your grant contract number provided by MNsure.
   b. Purchase Order Number – Fill in your PO number provided by MNsure staff.
   c. Include invoice number (July invoice number starts with 01).
   d. Period Funds Requested For – Fill in period funds being requested for, using one of the options listed on the form.
   e. Name of Grantee – Fill in name of your agency.
   f. Type of Payment Request – Check type of request from the options listed on the form
   g. Expense – Fill in all expenses for the requested period by category.
   h. Advance Received – If you received an advance payment, put that amount in item (1) of right-hand column. Please reconcile the Advance monthly or before grant contract ended.
   i. Authorized signature and date
2. Attach request for payment form on email.
3. Final payment request (July).
4. Payments will be made within 30 days of receipt.
References and Related Documents
Grantee Monthly Reimbursement Form

General Information
Outreach and Enrollment Grantee
Request for Budget Revision

Scope
This policy applies to management of MNsure Outreach and Enrollment Grants.

Policy Details
Any overrun in expenses must be communicated in writing to MNsure. For any overrun on line items in the budget summary, except in the Personnel or Paid Partner Costs line items, the grantee may shift up to ten percent (10%) of a budgeted line item amount without prior approval from MNsure. Prior approval is required for any revisions exceeding ten percent (10%) of a line item, and all adjustments increasing or decreasing the Personnel or Paid Partner Costs line items. Grantees can request prior approval by completing the budget revision form.

Amendments are required to add a budget line item, extend the end date of the contract, and increase the total grant award, pursuant to clause II of this grant.

Any budget revision requests must be received by MNsure Community Specialists no less than 30 days before the end of the grant contract cycle. Grantee must provide reason for budget revision. Request for budget revision must be submitted by organization’s primary contact.

Procedures
1. Notify Community Specialist to assign form in Foundant.
2. Submit Budget Revision Request Form online for approval.
3. Approval will be made within 14 days of receipt.

References and Related Documents
Budget Revision Request Form
**Request for Work Plan Revision**

**Scope**

This policy applies to management of MNsure Outreach and Enrollment Grants.

**Procedures**

Grantees may revise their work plan strategies during the course of the grant period. Any revisions to work plan strategies must be communicated via email to the Community Specialist before activities are adjusted and documented in monthly reports after the change takes place.

A Contract amendment is required if changes are to be made to work plan goals and grant award amount.

**Procedures**

1. Notify Community Specialist to assign form in Foundant
2. Submit Work Plan Revision form online for approval.
3. Approval will be made within 14 days of receipt.

**References and Related Documents**

Work Plan Revision Form
Grantee Financial Reconciliation

Scope

This policy applies to management of MNsure Outreach and Enrollment Grants.

Policy Details

Under Minn. Stat. §16C.05, subd. 5, the books, records, documents, and accounting procedures and practices of the Grantee and its employees, agents, or subcontractors relevant to this grant contract shall be made available and subject to examination by the State, including MNsure, the Legislative Auditor, and State Auditor for a minimum of six years from the end of this grant contract. Upon request, Grantee must provide the State with any documentation necessary to facilitate payment for services.

MNsure conducts a financial reconciliation at least once during the contract year. This process reconciles a grant recipient’s request for reimbursement invoice over one period of time with supporting documentation for that reimbursement request.

Procedures

1. MNsure will notify grantees at least one month in advance of a reconciliation site visit through an email. The information will include the month of the invoice to be reconciled and the specific financial supporting documents requested to conduct the reconciliation.
2. Grantees will assemble all required financial documents related to the appropriate invoice and submit it to the grants manager during the site visit meeting for review.
3. MNsure Community Specialist will inform grantees in writing if additional documentations are needed to complete the initial review.
4. Grantees will be notified in writing of the outcome of the review before the end of the grant contract year.
Paid Partner/Subgrantee Monitoring

Scope

This policy applies to management of MNsure Outreach and Enrollment Grants.

Policy Details

Grantees are responsible for regular and on-going grant monitoring of their subgrantees, also known as paid partners, if paid grant partners are part of the grant budget.

For grantee organizations with paid partners, the lead agency must pay all invoices within 30 days of the lead grantee’s receipt of payment from MNsure for undisputed services provided by the paid partner and must pay interest at the rate of one and one-half percent per month or any part of a month to the paid partner on any undisputed amount not paid on time to the paid partner.

Procedures

1. Grantee will enter into written agreements with paid partners at the beginning of the grant contract year. Paid partner agreements must include work to be accomplished, payment amount and payment timeline.
2. Grantee will conduct at least one reconciliation of a paid partner invoice within the course of the grant year.
3. Grantee will conduct periodic evaluation of paid partner progress towards meeting project goals.
4. Grantee will notify paid partner in writing of the outcome of the reconciliation(s) and evaluations before the end of the grant contract year.
5. Grantee will provide reconciliation documents of paid partners upon request by the state.
Online Grants Management System (Foundant)

Scope
This policy applies to management of MNsure Outreach and Enrollment Grants.

Policy Details
MNsure requires each outreach and navigator enrollment grantee to submit all reports, invoices, budget revision or amendments requests, and work plan revision request through Foundant grant management online program.

Procedures
First Time Log In:
2. Enter your Email Address and the assigned Password.
3. Click “Log On.”
4. Your Dashboard page will open.
5. Click the drop down menu next to your name in the upper right corner and select “Edit Profile.”
6. Update any missing or outdated contact information and click “Save.”
7. Click “Change Password” in the lower right corner.
8. In the Add/Change Password box, enter a new password and confirm that password. Passwords should be at least 8 characters and contain at least one upper case letter, one number and one special character.
9. Click “Save Password.” You will see “Password has been saved.”
10. Close this box to return to the profile page.
11. Click “Save” to save any changes or “Cancel” to leave the profile page.

Tips:
- Pop-ups: Turn off pop-up blockers in your web browser settings or options.
- Dashboard: This is your home page with links to your grants and forms. The link to the Dashboard will always appear on your left hand menu.
- Time out: Users are automatically logged out of the system after 90 minutes of inactivity. Inactivity includes typing in form fields without clicking “Save.” A warning message will appear 10 minutes before you are automatically logged out.
- Save: Click “Save” often. The system only auto-saves every 20 minutes.
• Required fields: Complete all fields marked with an asterisk (*). You will not be able to submit a form unless all required fields are complete.

• Character limit: Text fields show character limits and remaining characters as you type. Characters include spaces as well as letters, number and special characters.

• File size limit: Maximum file sizes for uploads are noted in the instructions. If your file exceeds the maximum size, you will see a “File Upload Error” message.

• Print: In Follow-Up Forms, click “Follow up Packet” or “Question List” buttons to open printer-friendly PDFs of your forms.

• Submit: Review all forms before submitting. After you submit a form, you can’t edit it. You will need to contact your Community Specialist to make a correction.

• Follow up/Report View: Complete means the follow up/report is being accepted and approved. Otherwise, grantee will be asked to resubmit.

• Payment Date: This refers to the date your invoice was approved by your grant manager and forwarded financial staff for processing.

• Password: If you forget your password, use the link on the log in page to re-set it.

• Troubleshooting: Contact your Community Specialist if you have any problems using the system.