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.

PAL background

- 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    - Leads sent to inaccurate or outdated contacts, the wrong type of assister, or an assister in the wrong area of the state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

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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

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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.

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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 determine 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?

Reporting

- 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
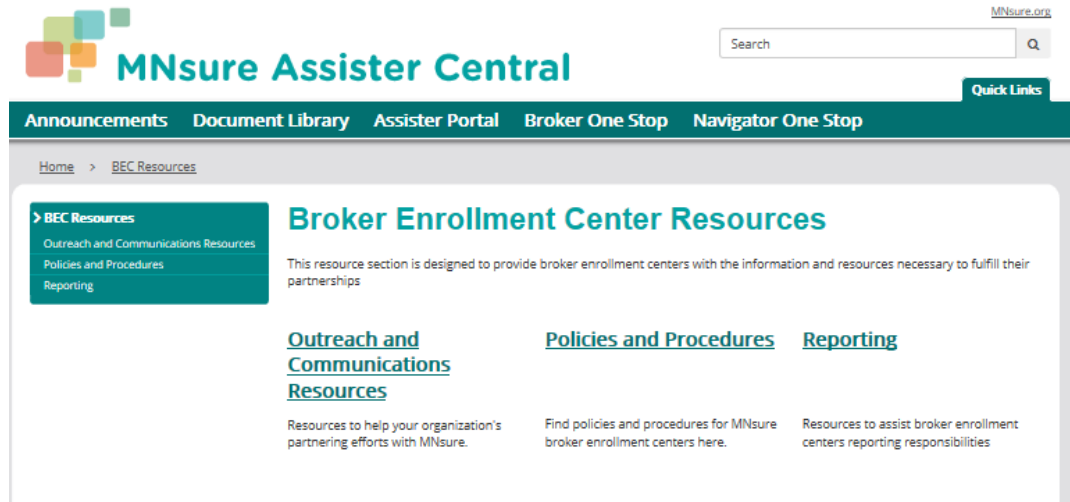
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Reporting rhythm for OE5

- 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

Policy online