

# Assister Updates MTF – July 2015

# Agenda

- Release 6.0 Overview – Online Application
- MassHealth Customer Service Operational Improvements
- Overview of Inpatient and Pre-release Services for Incarcerated Individuals
- CAC 2015/16 Recertification
- Required and Optional Assister Forms
- Questions

# Release 6.0 Overview

## Online Application

**The Release 6.0 update to the online application at MAhealthconnector.org is planned for July 17.**

**Planned updates/enhancements include:**

- Additional changes will be made to some screens in order to improve data collection and the user experience
- New system functionality will be added to determine the correct benefit for all disabled individuals in Standard coverage and children in CommonHealth
- Functionality will be added to more efficiently support shopping in certain exceptional cases outside of a Special Enrollment Period (SEP)
- In cases of birth, death, or exceptional cases, functionality will be added to change a member's coverage effective date to a date in the past

### Release 6.0 changes that consumers will notice:

- Certain Income questions and related responses will be more logically grouped together
- It will be easier to report Current vs. Next Year Income, Seasonal Income, Other Income, and Income Deductions
- Improvements will be made to the self-attested Citizenship/Immigration Status page, with clear instructions on how to proceed
- Immigration status will be clearly displayed on the summary screen (right now it only says Citizenship: yes/no)

## Assisters, watch for ...

- An Assister email with details about the changes
- An invitation to an Assister call where we will review 6.0 changes and provide the opportunity for Q&A

# MassHealth Customer Service Operational Improvements

## Staffing Enhancements

Action	Result(s)
<ul style="list-style-type: none"> <li>Added staff to our Customer Service Call Centers and re-deployed existing resources to address blocked calls and reduce wait times during renewals</li> </ul>	<ul style="list-style-type: none"> <li>Average wait times have been reduced by approximately 50% on average</li> </ul>
<ul style="list-style-type: none"> <li>Applied additional resources to the processing of paper documents in order to reduce the need to call</li> </ul>	<ul style="list-style-type: none"> <li>Overall call volume has decreased significantly from its peak in the early Spring</li> </ul>



## Initiatives In Process

- **Direct phone line for assisters** who are working with an applicant or member and need immediate CSR support
- **Improved HIX identity proofing process** that will allow more people to submit an online application on their own or with the help of an assister
- Enhanced training for MassHealth and Health Connector CSRs to **improve the customer service experience of callers from Mixed Households** who need assistance that crosses both agencies
- **Upgrades to the MassHealth website** to provide quick links to information on MassHealth coverage types and managed care enrollment.
- An **online managed care enrollment form** that will:
  - Streamline the enrollment process for members eligible for managed care
  - Allow online and phone applicants to request a plan immediately after eligibility is determined
  - Reduce phone calls to customer service, which also means an overall improved customer service experience due to lower call volume

# Overview of Inpatient and Pre-release Services for Incarcerated Individuals

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## Target population:

- Incarcerated individuals needing inpatient care for 24 hours or more
- Incarcerated individuals who have received inpatient coverage, transitioning to Pre-Release status:
  - MassHealth has an ACA application on file, as well as a case in MH systems for inpatient benefits
- Individuals who are in Pre-Release status: No inpatient coverage:
  - Inmate has not received inpatient coverage while incarcerated

# Overview of Inpatient and Pre-release Services for Incarcerated Individuals

## Applying for Services:

- MassHealth, in partnership with the Department of Corrections (DOC) and Houses of Correction (HOC), has created a streamlined application process specifically for use by correctional facilities
- Request for services are submitted by the DOC/HOC on behalf of the individual and will be processed by staff within the Central Processing Unit

# Overview of Inpatient and Pre-release Services for Incarcerated Individuals

## Key Points:

- For Inpatient Services:
  - No MassHealth card is generated. Approval Notice used as proof of inpatient services
  - Current MassHealth eligibility information for inmates is accessible through the MMIS/EVS system
    - MMIS/EVS will display, for inmate approved for inpatient benefits: “Inpatient Services Only”
  - MassHealth can only be billed for inpatient services
  - Covered services do not include dental or pharmacy benefits provided on an outpatient basis
  - MassHealth members who were living in the community and now are incarcerated are no longer eligible to use the community coverage, and would need to have their coverage changed to inpatient services, if needed
- For pre-release services, eligible individuals will receive full MassHealth benefits

# CAC 2015/16 Recertification

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- Annual Recertification is federally mandated
- Current Certification valid until December 15, 2015
  - Encourage all CACs to recertify once the recertification process begins
- Plans for CAC Recertification this Fall
  - Current CACs will have the option to take a Recertification test
  - Results determine which path the CAC takes to recertification – all courses or select updated content
  - Course content includes both Eligibility Policy and Applications—online and ACA-3
- 2015/16 Certification will be valid through December 15, 2016
- More details and timeline to come

# Required and Optional Assister Forms



Certified Application Counselors (CACs) are required to use certain forms to authorize and enable them to assist consumers appropriately throughout the process of applying for health insurance.

Other forms are not required, but may be used by a CAC with approval by the consumer.

The following slides provide a summary of guidelines on these forms, including

- Which forms are required and which are optional
- The length of time these forms remain in effect

CACs should download and review the job aid *Required and Optional Forms for Assisters - Amended 11042014* in the Learning Management System (LMS) for additional details.

## CAC Designation Form (Required):

- The CAC Designation Form (CDF) is what gives a CAC the authority to assist a consumer.
- ***CACs must complete a CDF for each consumer they assist, before they provide assistance.***
- Once the CDF has been signed, the CAC may perform any of the following activities that the consumer may request:
  - provide information about QHPs and insurance affordability programs such as MassHealth;
  - help the consumer complete and submit an application, renewal or other eligibility-related form;
  - help the consumer provide additional documentation to MassHealth or the Health Connector;
  - help the consumer respond to requests from MassHealth or the Health Connector about an application, renewal or related form;
  - interact with MassHealth or the Health Connector on the status of an application or renewal;
  - help the consumer enroll in a MassHealth or Health Connector program; and
  - offer and provide voter registration assistance (unlike other activities, a CAC must offer to provide voter registration assistance).

## CAC Designation Form (Required):

- ***A CDF does not authorize the CAC to act independently from or on behalf of the consumer, or to make decisions for the consumer.***
- A CDF does not allow the CAC to view eligibility notices or other communications from MassHealth or the Health Connector.
- A CDF remains in effect indefinitely unless the consumer or the CAC terminates or revokes the CDF.
- The CDF can only be found in the CAC LMS under “Resources.”

## Permission to Share Information Form (Optional):

- The Permission to Share Information (PSI) form authorizes MassHealth to share information with a specific person or organization identified by the consumer in Section 3 of the form (the “Recipient”).
- Health Connector Customer Service and staff members also require a PSI to share information with a third party about a member.
- The consumer decides what specific information or type of information can be shared with the Recipient by completing Section 2 of the PSI form. For example, if the consumer checks the first box in Section 2, he is authorizing MassHealth to share all eligibility notices and communications with the Recipient. MassHealth can only share the information that the consumer identifies in Section 2 of the PSI form.

## Permission to Share Information Form (Optional):

- A PSI form does not give the Recipient the authority to do anything for or on behalf of the consumer. Its only purpose is to allow the Recipient to access information about the consumer, as described in Section 2 of the form.
- If a consumer would like a CAC to receive copies of his eligibility notices, the consumer must complete a PSI form. The CDF is not sufficient because it does not allow the CAC to receive copies of or access this information.
- Consumers are not required to sign a PSI form to get assistance from a CAC. A PSI form may only be completed with approval by the consumer. A CAC is allowed to describe the PSI form and its authorities to a consumer and may advise the consumer that he or she can authorize the CAC to receive notices and communications if he or she chooses to do so. ***Read the job aid in the LMS for additional guidance.***

## Permission to Share Information Form (Optional):

- When discussing the PSI form with a consumer, it is the CAC's responsibility to provide the consumer with the information necessary to make an informed decision about whether or not to sign a PSI form. To do so, the CAC must provide a complete and accurate description of the PSI form and what it can be used for. The CAC cannot require that the consumer complete a PSI form under any circumstances, and cannot recommend that the consumer complete a PSI form unless the consumer has asked for the CAC's opinion or recommendation.
- MassHealth's authority to share information under a PSI form is valid for: (a) the period identified by the consumer in Section 5 of the form; or (b) if the consumer does not identify an expiration date, 18 months after the date of the form (in each case, unless terminated earlier by the consumer). The PSI form can be found online ([www.mass.gov/MassHealth](http://www.mass.gov/MassHealth) under "Applications and Member Forms").

## Authorized Representative Designation Form (Optional):

- The Authorized Representative Designation (ARD) form, formerly known as the Eligibility Representative Designation (ERD) form, is used by a consumer to give a person or organization (the representative) the authority to act on his behalf in all matters with MassHealth and the Health Connector. In other words, it enables the representative to do anything that the consumer can do himself in relation to MassHealth and Health Connector programs.
- A CAC may become a consumer's authorized representative only with permission and approval by the consumer. A CAC is allowed to describe the ARD form and its authorities to a consumer and may advise the consumer that he or she can designate the CAC as the consumer's authorized representative if he or she chooses to do so.  
***Read the job aid in the LMS for additional guidance.***

## Authorized Representative Designation Form (Optional):

- When discussing the ARD form with a consumer, it is the CAC's responsibility to provide the consumer with the information necessary to make an informed decision about whether or not to designate an authorized representative. To do so, the CAC must provide a complete and accurate description of the ARD form and make clear that the ARD form allows the authorized representative to do anything that the consumer can do (such as make changes related to the consumer's eligibility and enrollment and access the consumer's confidential information). The CAC cannot require that the consumer complete an ARD form under any circumstances, and cannot recommend that the consumer complete an ARD form unless the consumer has asked for the CAC's opinion or recommendation.
- Serving as an authorized representative is outside of a CAC's role, and a CAC is not required to agree to a consumer's request to act in this capacity.



## Authorized Representative Designation Form (Optional):

- There are three “types” of authorized representatives.
  - An “ARD 1” is a representative who is designated by the consumer in writing by completing Section I of the ARD form.
  - An “ARD 2” is a representative who designates himself to act on behalf of a consumer when the consumer is not capable of doing so because of mental or physical condition.
  - An “ARD 3” is a representative who has the authority to act on behalf of a consumer under applicable law.
- ***A CAC is not permitted to become a consumer’s ARD 2 or ARD 3 (unless the CAC has a personal relationship with the consumer and is not doing so in his or her capacity as a CAC).***

## Authorized Representative Designation Form (Optional):

- If a consumer requests that a CAC become his authorized representative, and the CAC accepts, the consumer and the CAC must both complete Section I of the ARD form. The CAC's authority to act on behalf of the consumer will not terminate until the ARD form has been terminated in writing by the consumer or the CAC.
- The ARD form can be found online ([www.mass.gov/MassHealth](http://www.mass.gov/MassHealth) under "Applications and Member Forms").

## Voter Declination Form (Required):

- Each time a CAC assists a *new applicant, or existing member they are helping with a new application, renewal, or change of address*, they are required to ask the individual if they want to register to vote, and explain that applying for or declining voter registration will not affect their application for health and dental benefits.
- Voter Declination Forms must be retained by the Assister organization for 22 months

# QUESTIONS?

