Health Home Care Coordinators Training

Outreach and Engagement Strategies

March 12, 2015

Six Care Coordination Services

- Comprehensive Care Coordination
- Care Coordination
- Health Promotion
- Information and Family Support
- Referral to social and other services
- Comprehensive Care Transitions

Today's Presenters

- Cathy McAvoy, MPA
  - Training Program Managers for Health Homes
  - Department of Social and Health Services
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  - Area Manager
  - Optum

Outreach Strategies adapted in part from

Hints on Engagement

Center for Health Care Strategies
Rethinking Care Webinar

October 5, 2010

Monica Stanley, Research & Data Analysis
Washington State Department of Social and Health Services

http://www.chcs.org/publications3960/publications_show.htm?doc_id=1261169

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Acknowledgements

- Our trainers from our Lead Organizations
- Experiences shared by Care Coordinators
- Experiences shared by outreach specialists

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Purpose:

Identify Strategies for Locating Clients
Introduce Techniques for Engaging Clients at the First Contact

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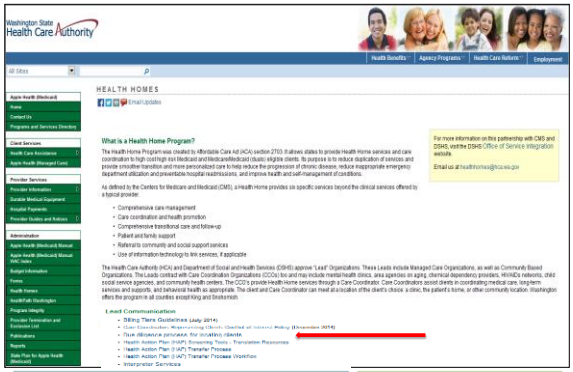
Learning Objectives

- Provide strategies for locating clients
- Offer techniques for increasing client engagement during the first contact
- Suggest methods for promoting health home services with other providers

Due Diligence

- Check with your Lead Organization and/or agency for their policy on due diligence
- Also visit the HCA website for guidelines located at:

http://www.hca.wa.gov/medicaid/health_homes/Pages/index.aspx



Tier 1

Initial outreach and engagement is part of Tier 1 services

Tier 1	• Initial engagement and action planning
Tier 2	• Intensive level of care coordination
Tier 3	• Low level of care coordination

Locating Clients

Locating Clients

- Use existing sources of data within your own agency
  - Area Agencies on Aging may use data from the CARE or TCARE programs, the ProviderOne payment system, and Respite Programs
  - Multi-service centers or medical clinics may have client contact information in other departments
  - Billing departments may have contact information

Locating Clients cont.

- The Department of Social and Health Services (DSHS) financial services specialists may have more up-to-date information on the client's address and/or phone number
  - Inquire about contact information
    - Is there a representative, payee, or guardian listed in ACES
  - Be prepared to describe Health Homes to the financial services worker
  - Contact Medicaid at: 1-877-501-2233

Locating Clients cont.

- The DSHS financial service specialist may have other collateral information in the documents contained in the electronic case record
  - Inquire about rent verifications: does it include contact information for the landlord?
  - Do bank statements contain the same or a different address for the client?

Locating Clients cont.

- The DSHS social service specialist or community nurse consultant may have information in CARE
  - Ask for current address and telephone
  - Inquire about collaterals including family, friends, guardians, and payees
  - Ask if the case manager can identify current or previous providers, the client's placement in a residential care or nursing facility, or other type of facility

Locating Clients cont.

- Contact community service officers in your local police department
- Contact local emergency departments (EDs) if the client is known to frequent the hospital
  - Review PRISM to identify ED usage patterns

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Locating Clients cont.

- Contact discharge departments to alert that you are attempting to locate the client
  - For the purpose of "coordination of care"
- Contact local jails, especially jail health
- Contact the post office for forwarding address and/or the online search

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Locating Clients: Online Research

- Websites to consider:
  - Facebook or Myspace
  - 411.com
  - Google or Bing
  - Pinterest, Twitter
  - PeopleFinder.com
  - Enter last known address to locate the name of the last landlord or apartment complex

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Locating Clients: Online Resources

- Additional Websites:
  - Metronet Experian
  - Employers
  - Online Yellow Pages
  - Court documents
  - PublicRecordsOfficial.com
  - Corrections websites:
    - Washington State Dept. of Corrections
    - County and city jail rosters

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Locating the Client

- When calling the client don't give up
- Call early in the month before cellular minutes are used up
- Try different days of the week and different times of the day

- Don't wait to start your outreach: clients may move within a day

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Outreach Letters

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Sample Letter

(INSERT AGENCY LETTERHEAD)

This letter is to inform you that due to changes in the *Affordable Care Act*, you are now entitled to additional services under your current health care plan at NO additional cost.

Your health insurance plan, (insert name of plan; Molina, Amerigroup, Medicare, Apple, etc.) is offering FREE expanded services to eligible persons living with chronic conditions. It has been determined that you are eligible for these services and (insert Molina, Amerigroup, Apple Health, Medicaid, etc.) has asked us to provide these services to you.

Services are not time limited. It is your choice to use them now or for future needs. However, you must be enrolled in order to receive them. Enrollment is free and easy. There is no application needed to apply.

All services are individualized, according to *your* needs & preferences and include services such as:

Access to medical, mental health, chemical dependency, and social services

- Connection to low cost services within your community; i.e., transportation, housing or other resources
- Referrals to low cost dental & vision care
- 1:1 assistance in person and/or by phone
- Help with obtaining in-home necessary medical equipment and/or supplies
- Home and/or hospital visits
- Assistance with doctor appointments, specialists, or other referrals
- Ongoing individual support

If you are interested in receiving these new FREE services, please contact us to schedule your enrollment appointment.

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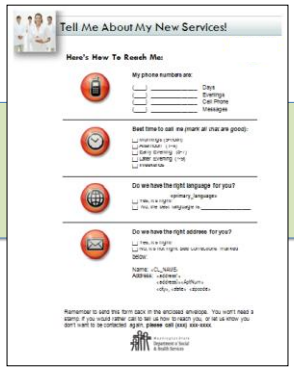
Give clients an opportunity to tell you how to contact them



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Key Phrases

- Entitled, free, local
- Use as much or as little, now or in the future
- Stress key points: *entitled, advocate, educate, answer questions, no extra cost, state-sponsored, additional coverage*
- The process: what to expect
- Reduce future calls by signing up today
- Offer 24-7 support with the 24 Hour Nurse Hotline

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Key Phrases

- "A simple verbal "yes" is all that is needed today.
- If yes, a Care Coordinator will call you.
- Would you like to receive a free health survey or health surveys?
- Can I send you additional material? Did you receive the welcome letter and benefits booklet?

Tips for Success

- Use a common logo or theme on all letters and forms
- Send a second letter
- Consider using a handwritten note to personalize the letter
- Provide call back numbers and locate in a prominent place on the correspondence
- Mail letters on Tuesday
- Make a follow up call 4-7 days after mailing any correspondence

Making Contact

Share Your Success

- What have you done to increase engagement?
- What works?
- What hasn't always worked so well?

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First Contact

- If you reach someone other than the client ask probing questions to find out the most recent contact information and best methods and times for reaching the client. Leave your contact information.
- Be aware of confidentiality
  - "I am working on behalf of the client's health plan."

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Develop Your Script

- Practice with other staff
  - What is your "elevator speech?
  - Be enthusiastic
  - Stress that this is a FREE, additional benefit
  - They do not have to change their current providers

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Develop Your Script cont.

- Suggested phrases:
  - " Your health plan (insert name of the plan) has asked me to call you."
  - " We are calling on behalf of your current health care plan."
  - "We are calling to let you know of some improvements to your health plan. You are eligible . . ."

Develop Your Script cont.

- Key phrases to consider:
  - Will not reduce your current services or benefits
  - Requires no application
  - We meet you in your own home or other location

Develop Your Script cont.

- Key phrases to consider:
  - Encourage enrollment now as a safety net for the future
  - Emphasize that their family or others may want this safety net for them
  - Client determines how, when, and where services will be provided
    - Stress that you value their time and other obligations

Develop Your Script cont.

- Key phrases to consider:
  - Ask them about their challenges and describe how Health Home Services can help
  - Opting in and out is easy
- If the client declines offer to send them information or a call back at a future time

Developing Your Script cont.

- Suggested phrases when leaving a message:
  - Include the phrase "health benefits"
    - "Your health insurance wants you to call back."
    - "You are eligible for free supplemental services. These may also benefit your family in managing your health needs."

More Ideas for Outreach

- If a client identifies a need before the face-to-face visit provide some service or resource at the first visit. For example:
  - Dentists that accept Medicaid can be difficult to locate
  - Information about assistance for paying for prescriptions
  - Names of optical services that provide reduced or free glasses or lenses

More Ideas for Outreach

- Share examples of some of the services other Health Home clients have received:
  - Health education and materials on their conditions
  - Achievement of long and short term goals
    - For example, a client wanted to be able to walk far enough to shop in the local mall.

First Contact

- Consider offering an incentive
  - "We have a $10 gift card for them."
  - Leave a phone number that will be answered when you are not available
- Create a "welcome packet" to mail or provide at the first visit

Successful engagement results when you are able to get clients to share information not give them information.

Goals for Engagement

- Meet the client
- Introduce yourself
- Identify how they prefer to receive information
- Identify who helps them make decisions
- Encourage the client to accept or consider accepting Health Home Services

Working with Collaterals

- Do not provide confidential information when working with another person
  - Indicate that it is a new benefit
  - Not able to provide further information due to confidentiality

Keys Considerations for Eliciting Interest in Health Home Benefits

1. Briefly state the purpose of the call and shift the conversation to their needs
   - Clients may be more likely to participate if they sense your interest in them and their needs
   - Use a reference they may trust
     - Do you work with case managers or another professional where they receive services?
   - Ask them if they received the brochure from HCA, Lead Entity or health plan

Keys Considerations for Eliciting Interest in Health Home Benefits

2. Avoid the use of acronyms and use simple language to communicate
   - Use words that contain fewer than three syllables when possible
   - Avoid jargon and slang
   - Consider that clients may have hearing impairment, has limited English proficiency, or may be distracted
   - Outreach workers should take notes to share with the Care Coordinator if you are calling on their behalf:
     - Information which may appear unimportant may provide insight for the Care Coordinator

Keys Considerations for Eliciting Interest in Health Home Benefits

3. Show respect for their time and understanding
   - Check with the client to see if this is a good time to talk
     - If not, offer a telephone appointment
   - Ask them for the name and number of a collateral contact in case the call is ended prematurely

Keys Considerations for Eliciting Interest in Health Home Benefits

4. Ask the client to share their concerns and experiences using the Medicaid program and/or their medical providers
   - By identifying barriers you may be able to identify an opportunity to offer assistance through Health Home Services
     - Including legal, housing, transportation, and other services

Keys Considerations for Eliciting Interest in Health Home Benefits

5. Use the client's identified issues or concerns to:
   - Explain how this program may:
     - Help them gain better service
     - Improve their health
   - Ask them what they fear they may lose by participating
   - Ask them what they may gain by participating

Keys Considerations for Eliciting Interest in Health Home Benefits

6. Ask questions to elicit their concerns about their health
   - Explain how Health Home Services can help
7. After asking a few questions ask them if they have time to answer a few more questions
8. Review PRISM data to identify hearing impairment or the need for an interpreter

Take Time to Listen

The greatest compliment you can give a client is to listen

- Do not call if you cannot devote the time
- Complete calls when you expect the fewest interruptions
- Mix closed ended questions with open ended questions
- Repeat back to the client to check for understanding

Take Time to Listen

- Probe the client to determine how they would like to receive information
  - Written communication
  - Follow-up call
  - Will the client agree to a face-to-face visit?
    - Who should be present at the visit?
    - Can you contact this person or persons to schedule a visit?
  - When asking questions to elicit personal information explain why they are being asked
    - Assure them that their answers will not result in a loss of benefits
    - There is no penalty if they chose to decline now or in the future

How Clients Make Decisions

Some things to consider:

- Some clients base decisions on information
  - They may need more facts about the program
  - Consider sending written material
  - Refer them to the HCA and/or DSHS website
- Some clients depend on the guidance or opinions of others to make decisions
  - Explore with the client who they trust
  - Request permission to contact this person/s

First Contact

- ✓ If you speak with the client request alternate numbers where they can be reached
- ✓ Request information about collateral contacts and ask for verbal consent to contact when appropriate
- ✓ Ask if they would like you to speak with their doctor or other healthcare provider
- ✓ Document the verbal approval until you can complete a Information Sharing Consent form (HCA-22-852)

Closing the Contact

Client Cooperation

- ✓ If the client remains hesitant to commit to a face-to-face visit
  - ✓ Assure them that they do not have to participate
  - ✓ Offer another telephone contact
  - ✓ Follow up with a letter
  - ✓ Ask if there is someone else you should contact

Summarize the Conversation Before Ending the Call

- ✓ If the client agrees to a visit:
  - ✓ Repeat the date, time, and location
  - ✓ Offer to contact collaterals that he/she may want to be present
  - ✓ Ask for their e-mail address to send a confirmation
  - ✓ Ask if there is any further information they would like or questions
  - ✓ Provide your name and contact information
  - ✓ Thank them for their time
  - ✓ Follow up with an appointment letter
    - ✓ Ask if someone else should receive a copy
  - ✓ Call to confirm that the letter has been received and to provide a reminder of the appointment

Tips for Improving Engagement

- Listen to the client
  - Repeating questions may signal that you are not listening
- Avoid interrupting or finishing their sentence
- Avoid talking too fast
  - There may be a language barrier or hearing impairment
- Avoid interruptions and placing the client on hold

Show your enthusiasm for the program and its benefits to your client

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Developing Community Contacts

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Outreach Includes Networking With the Community

- DSHS: local Community Services Offices, Home and Community Services, and Division of Developmental Disabilities
- Area Agencies on Aging
  - Aging and Disability Resource Centers (ADRC)
- Hospital and nursing facility discharge planners
- A Teams, Community Resource Teams, or Elder Abuse Councils
- Law enforcement and corrections
- Mental Health and Chemical Dependency clinics and providers
- Community Health Centers and other clinics

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Provider Letters

- Develop a letter to providers and community partners that:
  - Describes the Health Home Services
    - Process for enrolling
    - How it benefits clients
    - How it benefits the provider
  - Provide an example of a success story
    - Describe services, interventions, and outcomes
  - Provides contact information

Parting Thought

We describe this program as providing services that are *the **right care**, at the **right times**, and the **right places*** and acknowledge your efforts and successes in serving these clients

Let's See What Other Approaches Participants Have Shared

- What have you done to increase engagement?
- What works?
- What hasn't always worked so well?

Informational Web Sites

Health Care Authority:
http://www.hca.wa.gov/Pages/health_homes.aspx

DSHS Health Homes:
https://www.dshs.wa.gov/bhsia/office-service-integration/office-service-integration

Need further information?

E-mail your questions to:

Health Care Authority:
HealthHomes@HCA.wa.gov

Contact Information

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– 360-725-2637

Join Us

- Next Webinar
- Thursday, April 9, 2015
- 9:00 AM – 10:30 AM
- Topic: Comprehensive Care Management
- Make your reservation now at:

https://attendee.gotowebinar.com/rt/2336104130912005121

Post Webinar Discussion

- What are your best practices for locating and contacting clients?
- What experiences have you had telephoning your clients?
  - What key phrases have worked?
  - What has not been as successful?
- What other methods do you use to reach clients (e.g. letters, brochures, etc.)?
- What success have you had with reaching out to community partners and informing them about health home services?

Certificate of Completion

Outreach and Engagement Strategies

presented by Cathy McAvoy, MPA
Health Homes Program Manager
Integration Services - DSHS

Webinar aired on: March 12, 2015 in Lacey, Washington
for Health Home Care Coordinators

Please sign and date this slide to attest that you attended this training Webinar

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