



# O/E QPR Tutorial



# Health Center Outreach and Enrollment (O/E) Quarterly Progress Report (QPR)



# Agenda



- *Introduction*
- *Important Reminders*
- *Timeline*
- *Reviewing the Reporting Elements*
- *Helpful Resources*



# Important Reminders



- Health centers that have received initial O/E supplemental funding in FY 2013, FY 2015 and FY 2016 are required to submit O/E QPRs:
  - *Specific deadlines for each O/E QPR submission will be emailed through the Electronic Handbook (EHB).*
- FY 2016 Health Center O/E QPR reporting elements are available at:  
[Outreach Enrollment](#)



# O/E QPR Due Dates



- *O/E QPR Reporting Periods:*
  - *Aligned with each Federal fiscal year (FY) quarter.*
  - *QPR reporting typically opens on the first of the month following the reporting period and closes approximately 10-15 days later:*

Quarter	O/E QPR Due Date
Quarter 1 (October 1-December 31)	January
Quarter 2 (January 1-March 31)	April
Quarter 3 (April 1-June 30)	July
Quarter 4 (July 1-September 30)	October



# Reporting the Number of Trained Assististers



- Health centers must ensure that assististers working on behalf of the health center have successfully completed all required federal and/or state training (certified application counselor (CAC) or equivalent, at a minimum) to assist individuals with enrollment through the applicable marketplace type for the state for the 2016 open enrollment period.
- Every health center that has HRSA O/E funds should have a minimum of one FTE trained to assist with enrollment through the Marketplace.
- HRSA encourages health center staff who may assist only with Medicaid enrollment to complete CAC or equivalent training.



# How to Report the Number of Trained Assistants



Reporting Periods	Methodology
<p><b><u>Quarter 1</u></b> (October 1-December 31)</p>	<p>Report all <u>trained</u> individuals who have successfully completed all required federal/state training; even if that training was completed prior to October 1.</p>
<p><b><u>Quarter 2</u></b> (January 1- March 31)</p> <p><b><u>Quarter 3</u></b> (April 1- June 30)</p> <p><b><u>Quarter 4</u></b> (July 1-September 30)</p>	<p>Health centers should report only the number of individuals trained since the prior QPR (e.g., new staff or volunteers who are supplementing or replacing those reported as trained the prior QPR).</p>



# Medicaid & CHIP Assists



- **Should I report assists provided by individuals trained exclusively to assist with Medicaid and CHIP enrollment?**
  - *Yes. Health centers should report the assists provided by individuals trained exclusively to assist with Medicaid and CHIP enrollment.*
  - *Do not include assisters not trained to assist with Marketplace Enrollment in the “Number Trained” data field.*



# What should and should not be reported as assists provided?



<b>DO</b> report as an “assist provided” assistance with	<b>DO NOT</b> report as an “assist provided”
<ul style="list-style-type: none"><li>✓ Understanding health insurance options through one-on-one or other customizable education</li><li>✓ Creating a user account in the Marketplace</li><li>✓ Updating an account profile and/or income information</li><li>✓ Filing an exemption or appeal</li><li>✓ Understanding Marketplace auto-enrollment notices</li><li>✓ Submitting an application to/through the Marketplace or directly to the state Medicaid agency (also include as an application submitted)</li><li>✓ Understanding an eligibility determination</li><li>✓ Selecting a new or different Marketplace plan</li></ul>	<ul style="list-style-type: none"><li>☒ Mailings</li><li>☒ Brochure distribution</li><li>☒ Conference calls</li><li>☒ Large group presentations</li><li>☒ Public Service Announcements</li><li>☒ Other education and outreach that do not allow for customizable messages to consumers</li></ul>



# Reporting Applications Submitted



- Include all applications submitted to the Marketplace and/or directly to the state Medicaid agency for coverage in Marketplace qualified health plans and/or Medicaid or CHIP with the help of a trained assister working on behalf of the health center.
  - *Applications submitted for enrollment in a new or different Marketplace plan, even by individuals previously enrolled, and*
  - *Medicaid/CHIP renewals/re-enrollments.*
- *Note:* *All applications submitted should also be counted as assists provided.*



# Estimated Enrollments



Many health centers will not be able to directly link their assistance efforts to enrollment. HRSA does not expect health center assisters to make significant efforts (e.g., follow up calls) to determine whether an assisted individual has enrolled.



# Reporting assistance for one session



## Activities

In one session at XYZ Health Center, Sally does the following with the help of a health center assister:

- *Updates her income information,*
- *Submits an application for enrollment in a different Marketplace plan*
- *Selects a different Marketplace plan*

## Reporting

XYZ Health Center should report:

- 1 assist (one assist since there is only one session);
- 1 application submission (assistance resulted in an application submission in the same session); and
- 1 estimated enrollment (assistance resulted in an estimated enrollment in the same session).



# Reporting assistance that occurs in more than one session



## Activities

- **Session 1**: *Mary visits XYZ Health Center in October for a group education session about the Marketplace.*
- **Session 2**: *Mary returns to XYZ Health Center in mid-November and submits an application with the assistance of a health center assister but wants more time to select a plan.*
- **Session 3**: *Mary returns to the health center and selects a plan with the help of a health center assister.*

## Reporting

- Session 1: One assist provided
- Session 2: One assist provided and one application submitted
- Session 3: One assist provided and one estimated enrolled



# Reporting for an individual representing other family members



## Activities

Mrs. Johnson comes to XYZ Health Center seeking health insurance for herself and three family members.

With the help of an assister at XYZ Health Center, she successfully sets up an account, submits an application, and enrolls in a plan for herself and her three family members.

## Reporting

- 4 Assists provided
- 4 Applications submitted
- 4 Estimated individuals enrolled



# BPHC O/E Resources



	Resources
<ul style="list-style-type: none"><li>• <b>Frequently Asked Questions (FAQs) &amp; Other Resources</b></li><li>• <b>Recordings of Technical Assistance Calls</b></li></ul>	<p><a href="#">Outreach Enrollment</a></p>
<b>Program and budget issues questions</b>	Email the Bureau of Primary Health Care Outreach and Enrollment Team: <a href="mailto:bphc-oe@hrsa.gov">bphc-oe@hrsa.gov</a>
<b>Technical issues</b>	Contact the BPHC Helpline for questions on navigating and completing forms in EHB: <a href="#">BPHC Contact</a> or Call: 1-877-974-2742