

**Health Resources and Services Administration  
Bureau of Primary Health Care  
Health Center Outreach and Enrollment (O/E) Update  
December 5, 2013, 3 to 4 p.m. ET**

Coordinator: Welcome and thank you for standing by. At this time all participants are in a listen-only mode until the question and answer session of today's conference. At that time if you would like to ask a question, press 'star 1' on your touch-tone phone. I would also like to inform all parties that this call is being recorded. If you have any objections please disconnect at this time. I would now like to turn the call over to miss (Susan Edwards). Thank you, Ma'am, you may begin.

(Susan Edwards): Thank you, (Holly). Hi, this is (Susan Edwards). Good afternoon and good morning to all of you on the west coast. Thank you for joining us today. On today's call - we also have slides available for today's call which can be found at our website at <http://bphc.hrsa.gov/outreachandenrollment> if you would like to follow along.

Now for a brief over review on today's call. We'll start with a quick introduction followed by a brief Federal update, an update on the results of the quarter one progress report and some important reminders for the quarter two reporting. And finally, there will be time for questions and answers during today's call. With that, I will turn it over to (Jim Macrae), for a brief introduction.

(Jim Macrae): Great. Thanks, (Susan), and thanks everybody for joining us. Really happy that you could be part of today's call. It's a very exciting time in terms of what's going on with respect to the Affordable Care Act and in particular in your role as part of the roll-out of the Affordable Care Act. Health centers are being called upon repeatedly to be a key part of really making sure that this

whole effort is successful. And I just personally want to thank you for all that you have done and I know will do in the future to get as many people enrolled in terms of all of the different affordable health insurance programs that are out there.

We also know that it has not been the easiest time for you in terms of what's gone on, especially over the past two months. Some of the challenges we were definitely aware of and knew what happened and then others have definitely been something that I think none of us expected. And you, I think, have really risen to the occasion in terms of what you've been able to accomplish. And I really personally again want to thank you for all of your efforts to, you know, overcome those obstacles and really importantly share with us what some of those concerns and issues are, because that's been extremely helpful for us to be able to share those with other people, both within our agency as well as across the department.

And it has made a tremendous impact. I know sometimes you may not feel that way but it really does, being able to hear your stories and your challenges as well as some of your bearers has been extremely helpful and I think has made things a lot better in terms of what we're starting to see now is some significant improvements in the whole process.

You all have been called on to do be a variety of different roles, some of which you may have thought you signed up for and others you may not have realized. You have been patient educators, you have been of course enrollment counselors, but you have also been in some cases conflict managers, you've definitely been innovators in terms of being creative around workarounds, you've become IT specialists in a lot of cases. And in a lot of cases you've been sort of that voice of reason and sort of calmness in a

storm to help people navigate what has sometimes been a very frustrating process. So again, thank you for all that you do.

In terms of where we are, it's really an exciting time. We also know it's a highly stressful time. There is a lot of interest now, especially with some of the improvements in the website for people to get enrolled. And so many of you have shared with us and we are seeing it nationally a large increase in demand for the services. And you all again are stepping up to address that and we know again it's not easy, but we would ask you to do everything that you can to meet some of that demand. Because there are clearly individuals out there who need health insurance by January 1, and so the next several weeks are critical in terms of them being able to be enrolled into whether it's Medicaid or into a qualified health plan.

And again we know sometimes it's not easy to work through all of those different things but clearly there are some things that have made life easier in terms of the website, in terms of that now browsing feature that's available where you can actually see the different plans, that's definitely helped. In addition there have been several other updates which I know (Susan) and others will talk about, but please, whatever you can do to really try to make an effort over the next several weeks to get things out the door and get folks enrolled, that would be helpful.

In addition, I would say for this call we really need to hear from you about what you need from us. We have been able to share some best practices: that's been really helpful. Some of you have been extremely creative, have even thought about doing more group and classroom-type settings in terms of doing some of this enrollment, where you actually have assistors working with multiple groups and actually sort of doing it in a teaching format where

people can literally raise their hand and have people come and assist them as they need help, sort of that real time group assistance. And we found that to be really helpful.

Other of you have triaged folks to really focus on those who need to be enrolled right now versus those that may just need some additional education or just some additional handholding in terms of the whole process. So please, continue to share those strategies. We actually have several of those up on our website and I think (Susan)'s going to speak to some of those more directly. But, you know, keep sharing those because if one of you all has figured it out it really helps for everybody else to figure it out, too.

The last thing I would just say is, you know, we will continue to be here. We will continue to try our best to support you. Please know that what you share with us is really important and valued. You know, you were able to submit into us your quarterly progress reports. That has been extremely powerful information for us to have. We now - and this is as of September 30th - have over 5000 people in health centers that are certified to be able to do this work. We anticipate that number to go up significantly with next quarter's report.

We also were able to enroll what was it, close to - over 100,000 people were ultimately enrolled. And this was even prior to the qualified health plans being available. So - and then, just in terms of assistance it was well over 400,000 people. So clearly - and this is before the whole thing even began - you all have been doing some great work.

But the real challenge now is going to happen in terms of all of this. So please again if there's anything we can do, please tell us. You know, we are going to

have some time at the end of this call for Qs and As, but I would also say if there are certain things that you need from us, you know, whatever those things are, resources, tools, things, please tell us what those things are, because we want you to be successful. So thank you. And with that I'll turn it back over to (Susan).

(Susan Edwards): Thank you, (Jim). And we'll start with the Federal update. For those of you following along on the slides, this is slide number three. And we'll start with a quick reminder of an update that was shared a couple weeks ago about revised open enrollment dates. First, for the enrollment year we are currently working on, 2014, the deadline for enrolling a plan that would start on January 1st is now December 23rd. Second, for next year's enrollment, 2015, open enrollment has been moved back and now begins November 15th, 2014 and ends January 15th, 2015.

Now we'll move on to an update from CMS for all of those who are working in Federally-facilitated marketplaces. Hopefully you are already receiving these updates through CMS's list serve and on CMS's call yesterday, but it's worth noting that they have very recently made improvements to healthcare.gov and provided additional resources to help consumers complete their enrollment. Enhancements to healthcare.gov include a robust window-shopping experience and a new feature that allows enrollees to remove an open application and start a new one.

Additional resources for assistors include a tip sheet called 'Tips for helping consumers enroll' which walks assistors through how to address common issues such as what do you do when a consumer is stuck somewhere in an application. CMS has also added a new caseworker system for complex cases that need support beyond what the call center has available. And all of these

resources and much more can be found at CMS's assistor resource page which can be found by going [marketplace.cms.gov](https://marketplace.cms.gov) and clicking on 'resources for assistors,' which is - can be found in the center of the page.

I should also note that some of these new resources will help address many of the questions that we have been receiving from you all in the inbox and through the PCA weekly updates. So these are definitely resources that are worth exploring if you haven't already.

Now for everyone on the call - that includes assistors in state-based and Federally-facilitated marketplaces - we here at BPHC have updated the outreach and enrollment FAQs to include some new FAQs on the sliding fee and ASA and on outreach and enrollment assistor roles. You can find these FAQs on the BPHC ONE website [bhpc.hrsa.gov/outreachandenrollment](https://bhpc.hrsa.gov/outreachandenrollment). Again that [B-P-H-C.hrsa.gov/outreachandenrollment](https://B-P-H-C.hrsa.gov/outreachandenrollment).

Finally, another resource that (Jim) mentioned that we have developed actually came directly from you. We've compiled strategies for addressing the increase in consumer demand many of you are already facing as we are approaching the December 23rd deadline. You shared these resources with your PCAs and we've compiled them and put them on our website and they can be found again at [bhpc.hrsa.gov/outreachandenrollment/enrollmentassistance.pdf](https://bhpc.hrsa.gov/outreachandenrollment/enrollmentassistance.pdf). These strategies you shared range from increasing staff capacity, expanding partnerships and referral networks to innovative assistance techniques, such as having multiple computers using - multiple consumers using several computers in a classroom-like style.

We understand that health centers and communities vary and different strategies will work for - better in different locations. So please take a look at this resource and see what will work for you. And also, please keep sharing your ideas or what has been working with your PCA or directly with us in our inbox at bphc - excuse me - [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov).

And with that, that's up for the Federal update and we'll now open up for a brief question and answer before moving on to the next agenda item.

Operator, will you please open the queue up for questions.

Coordinator: Thank you. We will now begin the question and answer session. If you would like to ask a question please press 'star 1' on your touchtone phone, ensure your phone is not muted and record your full name clearly when prompted, as your name is required to introduce your question. To withdraw your question, press 'star 2.' One moment please for incoming questions. Our first question comes from (Sophia.) Go ahead, your line is open.

(Sophia): Yes, hi. I wanted to ask: we've been getting a lot of phone calls because we set up a call center line. And of course the initial plan was that our counselors would be helping with answering that line, but we are so busy with so many clients on a daily basis that we're probably going to go ahead and need to resort to volunteers to help us answer those lines. And I wanted to find out: do those volunteers need to be certified to be able to provide answers and for us to basically I guess count those - that information that is provided over the phone as assists in our report?

(Jen Jospheh): Hi, this is (Jen Joseph). That's a great question. I think that if someone is assisting someone with the enrollment process through the marketplace that you would need to have them trained. But if they're providing that

customizable education about why they might want to enroll and information about the affordable insurance options we wouldn't - they would certainly - and I'm assuring that they're trained and have the accurate information to share with the folks who are inquiring - that you could count that assist without them being trained as a certified application counselor, as long as you as an organization are assuring that the information they're providing prior to the enrollment process is accurate.

(Sophia): Right, because basically what we're doing is we're looking at working with some interns from one of the colleges. And their hours are limited. You know, so I was just wondering about all that extra time that we would have to take to get them certified. We certainly will be providing them with, you know, some very good information.

And yes, they basically just ask - they just answer very basic questions - or they will be answering, I should say - very basic questions for people that call in. And then they will go ahead and schedule them with a counselor that can go ahead and help them with the enrollment process and more detailed information.

(Jen Jospheh): But, you know, to the extent - I'm not sure what state you're in and what the training requirements are in your state.

(Sophia): Texas.

(Jen Jospheh): So it may actually - depending on the number of hours for training, even if there's a, you know, a portion of the training, even the basic BAC training, you know, we know that that's only five hours, that it might be advantageous for them to participate in that. They become - at least have that foundation

of information. That might be a way to make sure that there's a uniform sort of competent across all the folks that are giving information. But in terms of our specific requirement for reporting assistance, we wouldn't necessarily require there be the one to one for training - for formal training for just the education piece.

(Sophia): Okay, thank you.

(Joanne Matlack): And this is (Joanne Matlack) and I'm with the Department of Health and Human Services and work on the certified application counselor program. I think (Jen) is correct is what you're talking about is having people answer very general question and not help with facilitating enrollment, that they would not have to be certified under our rules. However, the state may have different rules, and so you really need to check with what the state requirements would be and whether they would require any kind of independent licensing or certification.

(Sophia): Okay, thank you.

Coordinator: Our next question comes from (Lane Jacobs). Go ahead, your line is open.

(Lane Jacobs): Good afternoon, everyone. I was on both CMS calls yesterday and I'm really excited about all the changes and updates and improvements that have been made. But what I'm - what I didn't hear addressed and I am wondering: how can CAC sort elevate really difficult questions to the caseworkers? You know, I know the caseworkers are there now. I'm just kind of wondering what the process is. What do they need to say?

And you guys may not have the answer, but we - our - some of our CACs have had some really bad experiences with the call center folks. And I just want to make sure that, you know, that if they find themselves in that situation that they can, you know, take the next step and go to someone who will have the answers for them.

(Joanne Matlack): This is (Joanne) at CMS again.

(Lane Jacobs): Hi (Joanne).

(Joanne Matlack): Unfortunately I don't have an answer for you on exactly how to access that. We're actually in the process of getting that pinned down. If you've called the call center - I mean, the call center should always be your first line of contact. And if that is unsuccessful you're right that we are setting up a casework system. And I did have a conversation with that person just this person about, you know, how does that - how is that going to work in terms getting into that system. So I'm - I hate to say this but I'm going to have to get back to you to provide that, because I don't have a good answer for you right this minute.

(Lane Jacobs): That's okay. And I just want to say the updates that - and the changes that have happened in the last few days, our CACs are really noticing them. So they're having success, which is really wonderful for them.

(Joanne Matlack): That's great to hear. And just to reemphasize that, you know, before even going to the call center we're hoping that the new functionality that's been put in place will get people who have been stuck in the process in some way unstuck...

(Lane Jacobs): Yes.

(Joanne Matlack): ...so that they can move forward. And that may ameliorate the need for, you know, getting any help.

You know, we certainly aren't trying to deter people from reaching out to get help or filing an appeal or do whatever they feel that they may need to do, but we do encourage you to try to use the functionality of going in and first off, if it's an issue of not having received an eligibility determination there is a process now for individuals rather than waiting for something to come in the mail that hasn't come to actually go online and access the eligibility determination themselves that way. And if that does not work, then they can also, you know, go in and remove an existing application and submit a new one to try to move - get themselves moving towards enrollment.

(Lane Jacobs): Removing the existing application that sort of got stuck, that worked beautifully yesterday for a number of health centers.

(Joanne Matlack): Well that's great feedback.

(Lane Jacobs): Yes, so we appreciate it.

Coordinator: Our next question comes from (Alice Pallard). Go ahead, your line is open.

(Alice Pallard): Great, thank you so much. Thanks for this call today. So like (Lane) we were also able to participate in the CMS call yesterday and a number of our health centers have noted improvements with healthcare.gov. But as you just noted most of the solutions for people who are having trouble applying are through

healthcare.gov and I know they mentioned on the call that they're really discouraging paper applications.

One of the issues that we run into is that we still have some health centers that consistently cannot get through healthcare.gov. It's not even directing them to the queue or letting them to create an account for people. And this is a consistent problem across several health centers. So I'm just wondering what the message is for those who can't access the system and if there continue to be improvements and are there any things that they can do to address the issue?

(Joanne Matlack): I'm a little stumped on that one. I'm not sure why specific health centers are encountering the problem again and again when others would not be. Do you have any more information that would help us? I can certainly try to, you know, elevate this in some way if there's a specific issue in a certain region or, you know, there was some other feature of those health centers that could explain why they are specifically having problems.

(Alice Pallard): Sure. I mean, we can certainly look into the details. You know, I do think that it is across a few health centers, so I don't know if there is anything they kind of share in common or if there's things that they should be looking for on their end in terms of technology. I mean, I believe that most of them have done the things on the website that it suggests, which is clearing out cookies and restarting and things like that. So I don't know if you have any suggestions or can look into things that they should be looking into on their end.

(Joanne Matlack): I'm not so versed on the technical part of it. Have they called the call center and not been able to get any help from people on the other end of the line with regard to how to address those kinds of issues?

(Alice Pallard): Yes.

(Joanne Matlack): Okay.

(Alice Pallard): They tried that. They've run into a wall there as well.

(Joanne Matlack): Well, if you could provide any additional information and even health center's names and the region - you know, and locations I can try to pass this along to people who may be able to provide some insights.

(Alice Pallard): Great. Thank you, I appreciate that.

(Joanne Matlack): If you'll send that to the HRSA folks they can get it to me.

(Alice Pallard): Okay, great. Thank you very much.

(Jen Jospheh): Perfect. And this is (Jen) and likewise for anyone who has a situation that would otherwise move into what you would think as a casework system - and so we have more and better information about how that works and how to do that, you can continue to send those issues to us. And we'll share them through our mechanisms with our colleagues at CMS.

Coordinator: Our next question comes from (Tyler Graf). Go ahead, your line is open.

(Tyler Graf): Hey, just one quick comment on I believe her name was (Alice) that spoke about the few health centers having issues: we were kind of dealing with the same thing and one of our IT guys on a whim suggested maybe switching over. We were using Explorer and he downloaded Firefox onto all of our computers. And it may just be a huge coincidence but once we started using Firefox with help - with the marketplace it seemed to work a lot better. So I don't know if you maybe want to give that a shot with some browsers or not.

(Susan Edwards): Thank you for that update. We've also heard that Google Chrome works well too, so.

(Tyler Graf): Yes. My question's real simple I was asking if I could get that website address again that you gave at the beginning that had the Powerpoint slides?

(Susan Edwards): Certainly. The website you want to go is [bphc.hrsa.gov/outreachandenrollment](http://bphc.hrsa.gov/outreachandenrollment). That's all one word, 'outreach and enrollment.' And the slides should be right at the front of the page. Okay, and I think we're ready to move on to the next agenda item. We're going to discuss the quarterly progress report. And I'll hand it over to (Matt Corver).

(Matt Corver): Thank you, (Susan). Just a few quick updates, and we're going to start on slide four of the presentation that's up on the website that (Susan) referenced.

(Ethan): Real quick, just to clarify where it is on the site: it's under the quarterly progress report section towards the bottom of the page.

(Susan Edwards): (Unintelligible) the sides from the (Unintelligible).

(Ethan): Okay. Oh, okay. Never mind.

(Matt Corver): Okay, so starting on slide four Mr. (Macrae) already indicated the data that we got from quarter one. From quarter one related to...

(Jim Macrae): Only my dad calls me Mr. (Macrae).

(Matt Corver): ...(Jim) provided us with the data from quarter one. 5000 health center (Unintelligible) assistance workers were trained. Over 400,000 - nearly 430,000 individuals were assisted, which really demonstrates the effort that health centers have put forward with their outreach and enrollment activities. This is actually prior to the open enrollment period of October 1. So those numbers are pretty powerful.

So if you go to slide five, this is where we'll start to talk a little bit about the next quarter, so the period that we're kind of in right now. And reporting in quarter two, which will now be the period of time October 1 to December 31st, 2013. The reports - or the EHB reporting mechanism will be available starting January 1st and will be open until January 10th, 2014, 11:59 PM as it was with the previous quarter.

We know that, you know, January 1 is a holiday for most but, you know, we've tried to give enough time during this period of time to have you submit on the [bhpc.hrsa.gov/outreachandenrollment](http://bhpc.hrsa.gov/outreachandenrollment) website. We've also updated our previous call slides - the QPR slides. I think that was what (Ethan) was actually referring to.

(Ethan): Yes.

(Matt Corver): If you go to the website those slides have been updated to reflect more of the general requirements around the QPR. We've also updated the frequently asked questions related to the QPR. There are two new question and answers, as well as some clarification on a couple of the items that we had previously.

There are really no significant updates for this upcoming quarter with respect to what you'll be reporting on. The major thing that we'll be changing is the focus. Last quarter the focus on the number of individuals that each health center has or has not trained as well as identifying in the issues barriers section in the strategies - alternate learning session, either how, you know, how - demonstrating the successes that you've had or relating the issues you've had with training in the 'issues and barriers' section.

So in this next quarter we'll be evaluating all the data elements. So we hope that if you do have issues that in the 'issues barriers' section you'll be identifying what those situations are that are contributing to, you know, perhaps not a small numbers in each of the data elements.

On slide six - this is just a briefly updated reminder about the 'issues and barriers' section. So what we would like for you to focus in on is the difficulties that you've had with hiring or now retaining your health center ONE assistance workers. Perhaps your continued challenges in your organization getting staffed to certified as certified application counselors or whatever other training requirements are in your particular state, as well as if you can just describe your general issues with perhaps implementation of the overall ONE efforts or activities.

Moving on to slide seven, again, this is somewhat of a repeat from the slides from last quarter regarding what we'd for like you to talk about with respect to strategies and lessons learned. So talk about your health center's educational events that attract a lot of people, successful collaboration you've had with other health centers or providers in the service area. This is a little bit - this is a new element, the strategies that you've developed to accommodate a significant increase in the number of individuals that are now seeking enrollment, due to the fact that we're now reporting - having to report for the open enrollment period or as a result of the improvements to the healthcare.gov website, as well as lessons learned that will inform activities in the next reporting period - or potentially just other health centers nationwide.

So then on the last slide, slide number eight, this is just a reminder again of all the resources that are available to you as you're gathering your data and alternately recording your information for the next QPR. The PCA contact list is - has a link there on slide eight. The [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov) inbox, if you have any programmatic-related questions, specific OE questions, please email that inbox. If you have any technical questions with the EHP then please contact the BHPC help line. The phone number is 877-974-2742, or you can email them at [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov). And again, as I mentioned before we have the new FAQs and new slides - or updates slides - I'm sorry, updates slides and FAQs, nothing new, at the ONE website at [bhpc.hrsa.gov/outreachandenrollment](http://bhpc.hrsa.gov/outreachandenrollment).

(Susan Edwards): Okay, thank you, (Matt). And with that we're moving on to question and answer period related to the reporting. If - operator, you could please open the queue for questions?

Coordinator: Yes. Again, as a reminder if you would like to ask a question press 'star 1' on your touchtone phone, ensure your line is unmuted and record your full name fully when prompted, as your name is required to introduce your questions. To withdraw your question, press 'star 2.' Our first question comes from (Linda Carmona-Sanchez). Go ahead, your line is open.

(Linda Carmona-Sanchez): Good afternoon. My questions really are not about this particular section about the reporting, so I'll make them very brief. I just wanted number one to point out to you that we have had a lot of consumers come back to us that had previously looked at some of the qualified health plans online and are now coming back and saying that the prices are different when they go online and look at the revamped website. So I just wanted to bring that to your attention.

And then I did want to ask about people who have employer sponsor's insurance but that the open enrollment date does not start until after March 31st. What do I tell them about complying with ACA requirements?

(Susan Edwards): Hi, this is (Susan Edwards). I believe if they have employer sponsored insurance it doesn't relate to the enrollment periods for the marketplace, because that has to do with people that are eligible for the marketplace and they already have insurance, so they would not be.

(Linda Carmona-Sanchez): Great. Okay, thank you.

Coordinator: Our next question comes from (Mary Chavez). Go ahead, your line is open.

(Mary Chavez): Okay, I had a question. I wasn't doing the quarterly reports because I was doing reports to New Mexico Primary Care Association. And I was wondering do I have to do separate reports for HRSA?

(Matt Corver): Yes, the - you do have to submit a quarterly progress report to HRSA as it relates to the outreach and enrollment supplemental funding that you received. So whatever reports that you're providing to your PCA, those are independent of, you know, what your requirements are to submit to HRSA.

(Mary Chavez): Well, how would I know which report that I have submit on a quarterly basis?

((Crosstalk))

(Matt Corver): It will actually be - in your HAD grant there's a progress report that will appear starting January 1st in the grant folder that will - that's what you essentially submit back to.

(Mary Chavez): Okay, where would I get that grant folder from?

(Susan Edwards): It's in your HRSA electronic handbook. So whoever has - is authorized to submit reports and access grant information between your health center and HRSA would be - you have to have access in order to submit and respond to the reporting requirement. The people in your organization will receive this as a submission.

(Matt Corver): If you go to the general TA slides related to the QPR there's a few slides in there that talk about, you know, how you can navigate to the actual report and, you know, the requirements for getting access to the grant folder and the report as well.

(Mary Chavez): Okay. So it's called the 'HRSA Electronic Report?'

(Matt Corver): Yes, it'd be the HRSA Electronic Handbooks is where the...

((Crosstalk))

(Mary Chavez): Oh, handbook.

(Matt Corver): ...enrollment, quarterly progress report will be submitted to.

(Mary Chavez): Okay. And say if my director has access to that he would be the one that I would go to to get that report that I have to submit?

(Matt Corver): Right.

(Mary Chavez): Oh, okay.

(Susan Edwards): And so - and just to be clear, there's a formal reporting process that's documenting the numbers of people that you're, you know, assisting, the applications submitted, the estimated enrollment, the number of folks in your organization who have been trained. And there's a less formal process where the primary care associations at our request and as part of their sort of routine operations and wanting to understand what's going on in their state so they can be supportive to you are asking about what your experiences are on a daily and now more weekly basis and providing us with updates. So that's sort of a less formal kind of update mechanism for us to learn through them what is working and not working for you at a local level.

(Mary Chavez): Okay. Since I haven't submitted reports from what period to what period do I need to submit one to become updated?

(Susan Edwards): So all of that information is in the slides that (Matt) referred you to...

(Mary Chavez): Okay.

(Susan Edwards): ...and I believe that we did get quarterly progress reports from every health center who received funding from us. So your organization did submit a quarterly progress report for the last quarter, so that might be helpful to reference as well. And if you have additional questions please feel free to send them to us at [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov).

(Mary Chavez): Okay. Also, is there a Spanish website, like to enroll people in the insurance exchange?

(Susan Edwards): They are developing a Spanish website and we're anticipating that that will become available shortly.

(Mary Chavez): Okay, thank you.

Coordinator: Our next question comes from (Jerry Vias). Go ahead, your line is open.

(Jerry Vias): Good afternoon, this is (Jerry Vias) in Texas. First of all I want to go ahead and do a shout-out to all the ACAs because of the job that they're doing, and let me tell you why. We're not only being certified application counselors, but we're having to be social workers, we're having to be peacemakers, and we're starting - we're having to go ahead and appease the clients.

And one of the challenges that we have seen and I was wondering everybody knows or if you are facing the same thing: we are doing the applications when we're able to get in. But once we go into the qualified health plans and what they're charging it's more than the 9% allotted. Let me give an example we had a client, one person, earned \$6000. And her payment was coming at \$240 a month. That's about 48% of her income. We're wondering if the website is still having some glitches. Hello?

(Susan Edwards): Yes, thank you for that. That is quite a challenge. I'm sorry, could you repeat it: it was \$6000?

(Jerry Vias): \$6000 annually, one person. And her premium - monthly premium when we input everything in the computer, her monthly premium was \$240 a month.

(Susan Edwards): Okay. Thank you for sharing that with us. I think that's something we'll need to address individually. If you could send that to the [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov) inbox we will definitely address that.

(Jerry Vias): You've got it. Okay, I will go ahead and do that. Now the other challenge that we're seeing is that we're having clients coming in and we've tried several times log in and they're not letting us in. And we've tried it at different hours: morning, afternoon, night, late night, early morning. And it's doing the same thing. And when we call the help center they don't seem to be a good help.

(Susan Edwards): All right. Thank you again for sharing that with us. If you could still send that to the BHPC inbox and we will share that with CMS.

(Jerry Vias): Okay, thank you.

(Susan Edwards): Okay, next question?

Coordinator: Our next question comes from (Danette Williams). Go ahead, your line is open.

(Danette Williams): Oh, hi. This is (Danette) for ONCSC. Actually, my question was from before when the website was someone asked and I got it. So that was all I needed, to get the slideshow and the Powerpoint slide. And I just needed the website because it was mentioned so quickly. But now I've got it and I'm following, so thank you.

(Susan Edwards): Thank you.

Coordinator: Our next question comes from (Irene). Go ahead, your line is open. Again, (Irene), your line is open.

(Irene): Yes, thank you. Good afternoon. Mine was from the previous slide section. My question is would you please elaborate on the sliding fee discount regarding those individuals who do not want to enroll in the ACA that are above the 139 of the Federal poverty level?

(Susan Edwards): So I think the easiest thing for us to do is if you referenced the FAQs that are in that updated document and have any questions, send them to us. Because I think we're going to learn from the questions that we get over time as people have time to digest what we've put out there and have a chance to talk with others in your health center or perhaps other health centers in your area. And let us know what you think and what challenges still remain that we might need to address.

(Irene): Okay, thank you.

Coordinator: Our next question comes from (Ralph Barbossa). Go ahead, your line is open.

(Ralph Barbossa): Good morning. Thank you all for holding the call. My question - I have two questions. Maybe one's a comment. It concerns a question that was asked very early on in the first section with regard to be able to count the assist. We are taking this morning alone - and I'm one of the point of contacts here for our center - this morning alone I've taken - I've spent about an hour plus this morning answering some fairly in-depth questions over the phone with regards to the enrollment process and of course some basic ones like "Where do they go to actually do the enrollment?"

If I understand correctly, on the guidance it says that "Assists and all the other accounts can only be done for those that are done in person." But did I catch halfway through that in fact we can count them as assists if it's done over the phone and it's a customizable conversation about enrollment?

(Matt Corver): Yes, actually that specific issue we have an updated FAQ. And the QPR FAQ said that actually removes the reference to 'in-person.' So...

(Ralph Barbossa): Okay.

(Matt Corver): ...over the phone assistance is fine to track as assists.

(Ralph Barbossa): Okay, excellent. I appreciate that. And then the other thing is that we are a California-based health center. And we are having significant problems with our ability to utilize the electronic system. It's actually extremely rare that we

have the ability to enroll someone using the electronic system. So we've been trying to roll that information up through Cover California but we still are continuing to have a significant trouble. And we've done everything from having our IT folks analyze the systems again and again and again. And it's very rare that we're able to enroll anyone, especially during the hours of about 10 AM to about 7 or 8 PM.

(Susan Edwards): Thank you for sharing that with us. And if you have anything that you'd like to share, please send it to the ONE inbox as well.

(Ralph Barbossa): Thank you.

Coordinator: Our next question comes from (Shae Grayling). Go ahead, your line is open.

(Shae Grayling): Hi, yes. I'm from (Zusal) Health Center in New Jersey. We had a question. We are collaborating on an event with CMS. And CMS had offered to have some of their enrollment contractors available to enroll individuals at the event. Are there any issues from HRSA's point of view on us doing that kind of collaboration. And in terms of reporting I'm assuming again that we would just report those that our certified application counselors assisted or enrolled and keep those separate from the ones that CMS contractors would be enrolling.

(Susan Edwards): We love collaboration. Collaboration's great. The more the better and the more people we can get enrolled in creative ways the better. But again for your reporting just report the efforts that are encompassed by your health center.

(Shae Grayling): Okay, that's great. That's what I thought. Thank you very much.

Coordinator: Our next question comes from (Leann Romero). Go ahead, your line is open.

(Leann Romero): I just got the answer to my question by going to the new FAQ section. Thank you.

(Susan Edwards): Yay.

(Leann Romero): It's very exciting. I got to get completely through online today at healthcare.gov with a lady and - who desperately needed insurance. And now this new FAQ and this is just a great day. Thank you, guys.

(Susan Edwards): Terrific. Let us just all sit in that moment.

((Crosstalk))

(Leann Romero): Yes. Oh, I'm - I have - it's been a great day. And thanks to everybody's help. It's been a struggle but it's well worth it when you can get all the way through with somebody and have them give you a hug. It's worth it.

(Susan Edwards): And so if you or anybody else on the phone has any of these - the success stories, I know that we were after you for these at the earlier part of the process and we know that it was challenging.

(Leann Romero): Sure.

(Susan Edwards): And now that we're in this new and better place...

(Leann Romero): Yes.

(Susan Edwards): ...it would be great to hear from you those kinds of successes and to be able to share those with others within our agency and within the department. Because I think it's important for folks to get a good sense of how this is playing out with individual people that you're working with.

(Leann Romero): I met with this particular client and we had completed a paper application. And she had received her eligibility results and it was determined that she wasn't able to receive a tax credit. I contacted the 1-800 number this morning and explained the situation, because I'd attended the CMS conference call yesterday and understood that you can have the application deleted and start fresh, because some of the information may have been saved incorrectly.

And the 1-800 number was able to delete the application. We were then able to create an account, do a new application for her, resubmit her information online and she was determined to receive \$300 per month in tax credits. So she left happy and I left - and when she left I was elated, so.

(Susan Edwards): Well that's fantastic. Thank you so much for sharing. And again, anybody who would like to share any more, please send them to the ONE dash - [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov) box. Thank you. Next question?

Coordinator: Our next question comes from (Angie) with a neighborhood health clinic.

(Angie): Thank you. I actually have kind of two questions that tie together. One of them is a reporting one: we - I want to clarify and make sure I understood. For us to count as assists that - but on completed both Federal and state training to be for - we're in Indiana so we have to be navigators for India and

of course Federal assist CACs. Is that correct, that you have to have met both of those requirements?

(Susan Edwards): So we need to revisit our FAQ and clarify this a little bit, because we know that there are circumstances - and one of the things we talked about I think in our quarterly progress report called 'the last time' that there are some areas where people are being assisted and there are some folks that are just doing Medicaid enrollment and aren't able to - based on whatever their state circumstances and requirements are aren't able to do both. And so we will clarify that FAQ to make it more clear about what you can count as an assist by whom and what kind of training they need to have.

(Angie): And the reason why I'm asking ties with my next question which was more the previous section, but in Indiana where a lot of the people that we're planning on helping to assist have hit some roadblocks in our state's requirements on how to become a navigator for the state. And so right now we're the only agency in northeast Indiana that's really doing anything.

So I'm trying desperately to partner with a local volunteer agency, but they don't have any funding to pay for all the training and certification requirements for state. So they have already 26 people who are Federal CACs and I'm now set up to be a training center at the state level. So I'm wanting to, like, bring their volunteers under our umbrella as our volunteers and have them become - go through the state training through us. But I wasn't sure how the process or who to contact regarding - is it possible if someone has initially gone through their Federal CAC training through a different designation organization for them to be transferred over to us.

(Susan Edwards): That's a...

(Angie): Because we want to do some mass enrollment, a mass education event.

(Susan Edwards): Okay, so mass enrollment we love. So - but let's - if you could connect with us offline, send that information - your contact information. We could follow up with you as needed, connect you with our colleagues at (Cisio) - or with CMS so we can sort of work through what potential issues we might need to work through to get things to work best where you are.

(Angie): And where do you want me to...

(Joanne Matlack): So let's...

(Angie): ...how do you want me to connect to you? Where do I go? Is it under the BPHC...

(Susan Edwards): Yes, [bphc-oe@hrsa.gov](mailto:bphc-oe@hrsa.gov).

(Angie): Okay.

(Susan Edwards): If you give us a brief summary then we can follow up and get any additional details and then continue our conversation as needed.

(Angie): Okay.

(Joanne Matlack): And this is (Joanne Matlack) and I can make a couple of general comments. Once someone has taken the CAC training as long as they have the certificate demonstrating that they've taken the training they don't need to take it again if they go to a new organization and want to affiliate with a new

organization. They would need to, however, get certified by the new organization if their affiliation is going to change from one organization to another. But they could show that new organization their certificate of completion of training in order - you know, as part of satisfying the requirement or certification with the new organization.

(Angie): Okay.

(Joanne Matlack): At least, that's true for the Federally-facilitated marketplace state. That is the rule that applies there.

(Angie): Thank you very much.

Coordinator: Our next question comes from (Dane Cameron). Go ahead, your line is open.

(Dane Cameron): Hi. I'm still in the embryo state of the navigator training. And I'm question whether or not there is an access code or a particular website that I should be going to to get the information that is not in a PDF format. Because what I'm looking at is the training course, of course, with out - and I'm locked in. I'm restricted. I'm not able to move forward - although I'm able to move from one page to the other - I'm not able to perform the drill down nor am I able to perform any of the functionality because it's all in PDF.

Woman: (Unintelligible).

(Dane Cameron): So my question is do I need a particular access number or code or something to be able to get to the actual navigator training site to be able to move forward to that end?

(Susan Edwards): Anything - and just for clarification: what state are you in?

(Dane Cameron): I'm in Philadelphia, Pennsylvania.

(Susan Edwards): Pennsylvania, okay. So...

((Crosstalk))

Coordinator: Our next question comes from (Sophia Castillo). Go ahead, your line is open.

(Jen Josphe): Hold on.

(Joanne Matlack): Wait, we can quickly address that question.

(Jen Josphe): So the process for folks in Federally-facilitated marketplaces is that that organization - so the health center has to apply to become designated as a certified application counselor organization. And once the organization gets that designation then the individuals can become certified by virtue of the organization assuring that people have gone through the appropriate training.

So where do they - I'm - it's been a while since I've talked about where that application actually is. Do you know if your organization is designated as a CAC?

(Joanne Matlack): We may have lost her.

(Jen Josphe): Oh, we may have lost her. So if you email your question to us at [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov) we can clarify where you are in that process, give you the direct

link if you aren't already certified - designated as a CAC organization and if you are what to do next.

Woman: Yes, and just a follow-up: when we designate a CAC organization we provide the organization with information about how people can get trained and with the specific instructions about where to get training and what kind of information needs to be provided. And one of the things that an individual should use when they are registering to take the training is the unique identification number that the organization will be issuing to them.

(Joanne Matlack): Okay, and thank you. And operator, this will be our last question.

(Sophia Castillo): Okay, am I on?

Coordinator: Okay, (Sophia Castillo).

(Sophia Castillo): Okay, thank you so much. (Sophia Castillo) from San Antonio, Texas. And the question that I have is regarding the people that we did applications for when we were just doing paper apps back in October. We had done a lot of - a couple of group enrollments where we had a lot of people. I think in our first enrollment we did, like, 100 people.

And some of those people are coming back and saying "I haven't received a response." And so we're unsure as to what to do. Should we go ahead and just do the application online, now that the online website is working? Or do we hold off? Because we don't know if those applications are being entered or how quickly they're being entered, you know, when the government is receiving them.

(Joanne Matlack): So our advice to folks is not wait to receive something on the paper application. If you submitted a paper application, what we're suggesting first of all is that you can go online to try to access your account, because it - when you submitted that paper application it eventually gets entered into the system. So we are suggesting that you go online and try to access your account to see if there is an eligibility determination there and complete your enrollment.

But to do this you'll need your application ID number. And you can contact the call center to get the application ID number. So that's what you're suggesting in terms of, you know, if you submitted a paper application or even if you applied over the telephone and the consumer is still waiting, that you try to take those steps to go online and see whether you can get the eligibility determination that way.

If you do - if you are not successful with that the other option that we've suggested is that you - let me stop there, because I think that - let me stop there, because I'm getting - I don't want to confuse things. That's sort of what we're mainly saying to people, to try to see whether or not you can get in and access the application that way. If you do get in and access the application but seem to be stuck then that's when you can try to remove the application and start over.

(Sophia Castillo): All right, so I start by calling the 800 number first to see if they can find the person.

(Joanne Matlack): See if they can give you the application ID...

(Sophia Castillo): Okay.

(Joanne Matlack): ...number so you can actually see if you can access the application online.

(Sophia Castillo): Okay.

(Joanne Matlack): Because you may be able to do that and find out if there is an eligibility determination based on that application.

(Sophia Castillo): Okay.

((Crosstalk))

(Sophia Castillo): Oh, sorry. This is even if they ever set up any type of account online.

(Joanne Matlack): Well, so...

(Andrea): (Joanne), if I could just add - this is (Andrea).

(Joanne Matlack): Yes.

(Andrea): (Sophia), this is great - a great question. And (Joanne) and her team has really done a really wonderful job of putting all of this detailed information to help folks. And I've shared this with a number of folks through the inbox. And it's on the marketplace.cms.gov assistors page. And there's a really helpful document that breaks down all of those detailed steps that (Joanne) is explaining.

(Sophia Castillo): Oh.

(Joanne Matlack): Yes, thank you (Andrea), that's great.

(Sophia Castillo): Now, a second question: as far as appeals are concerned if people do not agree with the results, from what I understand CACs are not able to file appeals. We need to refer them to a navigator, correct?

(Joanne Matlack): No, that's not correct. You can assist people with appeals. We don't say that's a required duty for a CAC but you can assist a consumer with an appeal.

(Sophia Castillo): Okay. And so in order to file an appeal we just direct them through the 800 number?

(Joanne Matlack): You know, I'm really sorry but I do not know the exact - all the details on filing an appeal.

((Crosstalk))

(Joanne Matlack): ...off the top of my head.

(Susan Edwards): We can also forward all of that along to EMS...

(Joanne Matlack): Yes, and I can get you an answer.

(Sophia Castillo): Okay.

(Susan Edwards): ...and it's [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov) inbox.

(Sophia Castillo): Yes, because this is a new thing that is coming up - that we're coming across now. So we're like "How do we file an appeal?"

(Susan Edwards): Sure, and that's one we've heard from a couple people. So please just send it on to us and we will forward it to CMS.

(Sophia Castillo): Okay, very good. Thank you so much for having this call.

(Susan Edwards): Thank you. And thank you everyone else who's also perhaps on the queue for questions. We understand we can't get to all of them today so please send those along to our inbox as well [bhpc-oe@hrsa.gov](mailto:bhpc-oe@hrsa.gov). You can get it all ready. And thank you all for the work that you're doing, and that will conclude today's call.

Coordinator: This concludes today's conference. Thank you for participating. You may disconnect at this time. Speaker, stand by for the post-conference.

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