

Health Center Outreach and Enrollment Best Practices



IPHCA

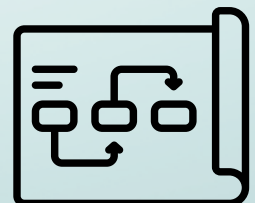


OUTREACH



GENERAL STRATEGIES

- Facilitate walk-in days with assisters to increase accessibility.
- Include a checkbox on intake and similar forms, providing clients with the opportunity to speak with an assister about affordable coverage options.
- Encourage clinic providers to ask about coverage and refer uninsured clients to assisters.
- Train clinic staff to answer basic insurance questions and refer clients.
- Have trained clinic staff wear "ASK ME ABOUT MEDICAID" or "ASK ME ABOUT INSURANCE" buttons to prompt conversations with clients.
- Display enrollment deadline countdowns in the health center lobby to improve client awareness.
- Host "lobby" days in the health center where assisters engage with clients in waiting spaces.
- Place staffed tables near entrances to reach clients seeking answers.
- Offer enrollment assistance and/or health insurance education at existing health center activities in the community.
- Incorporate staff from multiple departments in brainstorming sessions to identify new and existing partnerships.
- Coordinate brainstorming sessions to identify the best avenues to reach underserved community populations.
- Expand scope of outreach to develop new and atypical partnerships (e.g., cultural events, job fairs, expos, sporting events, stores/markets, restaurants).
- Coordinate table or booth space with popular seasonal events and venues (e.g., parades, festivals, state fairs, shopping malls).
- Coordinate joint education events with partners covering related topics.
- Equip staff performing offsite or door-to-door work with proper scripts and consent forms to collect contact information for assister follow-up.
- Maintain a consistent schedule (day and time) of enrollment and education events to aid clients in attendance planning.
- Build relationships with small businesses through education on SHOP and individual coverage options for employees, partnerships on outreach activities, and provision of promotional information for employees and customers.



OUTREACH

MARKETING

- Explore all available advertising options in the community (e.g., television, radio, email newsletters, social media, newspaper, public advertisements, PSAs, direct mail)
- Include Quick Response (QR) codes on posted flyers to provide clients with personal access to information.
- Identify the target audience of each advertising campaign and focus on the platforms that audience uses.
- Use slogans to attract attention and emphasize key messages (e.g., “STOP SHOP ENROLL.”)
- Highlight successes, events, and key dates on social media platforms.
- Lease advertisements in high-traffic areas.
- Encourage word-of-mouth promotion by assisted clients and outreach event attendees.



ENROLLMENT

STRUCTURING STAFF AND RESOURCES TO MEET COMMUNITY NEEDS

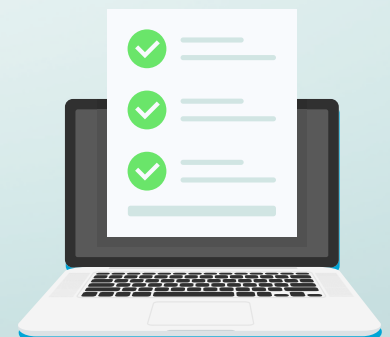
- Offer office hours outside of standard business hours to accommodate client work schedules.
- Maintain staff knowledge of culturally and linguistically appropriate services (CLAS) standards with regular updates and trainings.
- Identify lead staff to support assisters with complex cases, such as cases requiring communication with PCAs, CMS, or HRSA.
- Hire assisters with language proficiencies matching the languages spoken in the community.
- Allocate a private space for interpreter services for clients requesting assistance in a language not provided.
- Offer all printed materials in all languages present in the community.
- Offer large-print versions of printed materials.
- Ensure all client spaces are accessible or offer alternative meeting spaces for clients if access is limited.
- Identify neighboring assister organizations with different language assistance for coordination or referral.
- Engage with trusted community and state organizations to refer clients with questions related to complex topics (e.g., immigration)
- Compile a referral list of community resources for in-depth tax and income questions.
- Educate staff on how to approach conversations with clients about common concerns and objections.
- Communicate with neighboring assister organizations about best practices.



ENROLLMENT

STREAMLINING THE ENROLLMENT PROCESS

- Dedicate staff to schedule assister appointments.
- Review the workflow process regularly to ensure compliance with HIPAA and standards for handling PII.
- Create a decision tree of questions for initial-contact staff to assess client enrollment needs and prepare clients for first appointments.
- Use a state-specific templates to track client progress through state-based Marketplaces, if applicable.
- Use scheduling platforms that remind clients of upcoming appointments.
- Facilitate same-day scheduling or walk-in hours for clients.
- Identify partners with larger spaces to facilitate off-site enrollment events.
- Provide clients with folders that contain printed materials to assist with preparation for future appointments and general health insurance education, including:
 - Checklist of what to bring to each appointment
 - Information on any accounts created or any material printed during the appointment
 - Key date sheet, indicating open enrollment periods and when coverage will begin based on enrollment date
 - Eligibility and enrollment process flow chart, including all steps and highlighting the client's current step
 - Income guideline sheet that explains benefit and eligibility levels for affordable insurance options at different income levels.
 - Reader on the 10 essential health benefits.
 - Explanation of special enrollment periods.
 - Checklist completed by the assister outlining what was discussed with the client each visit.



ENROLLMENT

ENHANCING THE ENROLLMENT EXPERIENCE

- Use multiple monitors so both the assister and client can comfortably view the same information.
- Provide clients with printed materials to reference throughout an appointment, including definitions of terms and explanations of processes.
- Facilitate off-site enrollment appointments for clients with various challenges in reaching the health center.
- Provide printed materials that explain complex concepts, like MAGI and eligibility for programs, using different approaches (e.g., tip sheets, graphics, flowcharts).
- Offer flexible scheduling for clients receiving multiple health center services in the same visit.
- Create additional visual aids and graphics for clients who require or prefer visual learning.
- Acknowledge client concerns and stress throughout the process and pause to address concerns and confusion with facts and education when they arise.
- Educate clients on post-enrollment processes (e.g., use of coverage, payment of premium, billing for services, renewal).