



### **Assister Update Session**

*Leslie Wagstaffe, CMS*

*Delia Jones- McHorgh, CMS*

*Deborah Bryant, CMS*

*Gian Johnson, CMS*

*Sarah Barber, CMS*

Stacey Plizga: Our last speakers today will provide us with an assister update. From the Division of Consumer Advocacy and Assister Support for CCO's Consumer Support Group, that's a tough one, I am happy to introduce to you Leslie Wagstaffe, Delia Jones-McHorgh, Deborah Bryant, Gian Johnson and Sarah Barber.

Deborah Bryant: Thank you Stacey and thank you everyone for being here. We hope that today has been great for everyone so far. I'm Deborah Bryant. We are going to begin our last session of the day and during this session the purpose of this session is to provide you all with a few updates. We will have Delia who will provide updates about the CAC program and Gian who will provide updates about the Navigator Program. And then we'll have Leslie who will provide exciting news about the new assister training that will be rolling out later this summer.

But before we go on to these updates I just wanted us to take a moment to take a look back at the last open enrollment period. We've talked to many of you about what worked, what didn't work. I just want to share some things that we heard that did work. So, one key theme that we heard from you all revolved around partnership. Partnership, partnership,

## **Assister Update Session**

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partnerships. Those of you who partnered with other assister organizations really found that valuable in increasing your capacity to reach more consumers. So we really want to encourage you all to keep that up this open enrollment period. Meet people here that are in your state that you can partner with and do events with. Also along the lines of that theme of partnerships we found that assisters who partner with their state and local community social service offices, as well as their employment centers really found it valuable because they really found consumers who were looking for coverage and who are eligible for marketplace coverage and cost sharing and APTC and all of that. So if you're not already doing this, look to your local Social Service organizations in your community.

Many assisters found success in working with local retail stores who are closing in their area. So we know a lot of those big box stores are closing. But also work with your realtor associations because they need insurance too. So that's another option. But what we heard from last year were that a lot of you worked with your local retail stores who were closing and you were able to reach out to their employees and provide them options of health insurance coverage. In OE4 many of you saw a lot of repeat customers. This just proves that you all over the last four years have become a trusted source in your community. This is going to be even more important as we go until OE5 we all know you've been hearing it today already. I'm sure you'll hear it a lot tomorrow that we have a shortened open enrollment period. Reaching out to those consumers who you worked with in past years is very important and the earlier you get started the better.

## **Assister Update Session**

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During last year's OE, a lot of you use the coverage to care materials which was very great and I just want to encourage that some more. Because what we know is that many of these folks they get coverage but they don't know how to use it and that remains an issue. So use coverage to care. If you attended that session today, great! Share what you've learned with your other colleagues, take that back home. We'll do more follow-up sessions on coverage to care later in the Fall. Along those lines, so if you miss the breakout session because we were at capacity don't worry we will do repeats of these sessions during assister webinars later this Fall so you didn't miss anything, don't worry.

So, as we said there's a lot more to be done. So as you prepare for OE5, we want to hear from you on what you're going to focus on to make OE5 a success. So if you take out your devices, we have yet another fun polling question. I'm hoping maybe there's a delay. Here it is. So text us your response on what you're going to be focusing on for OE5 to make sure that it is successful. Outreach. Data, I love that. We've heard that a lot of our folks joining us online are also participating in polling, so I'm just going to let it go for a little bit to make sure we see some of their outreach. Clear messaging. Follow up with past clients. This is great. The benefits of insurance, that's really important. These are awesome. Keep them coming. I'm going to leave them up a little bit while I turn the mic over to Gian.

Gian Johnson: Hello, so I'm Gian Johnson. I'm the director of the Navigator program here. Many of you've probably seen my name on emails or heard me on TA calls for our navigator grantees. So, my updates are going to be solely focused on the CMS Navigator Grantee Program after this my colleague Delia is going to come up and talk about the CAC program a little bit.

## **Assister Update Session**

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So for our Navigator grantees, many of you have been working really hard to get ready for the next OE. You all submitted your non-compete applications in early June. Thank you all for all of that hard work. We wanted to get those in before the summit so you didn't have that hanging over your heads. Our team will be reviewing those in July and August. Your project officers may be reaching out to you in July and August if they have questions as they review and approve your application. We are expecting to send out the new notice of award for the third budget period on September 1<sup>st</sup>. The actual budget period won't start until September 2<sup>nd</sup>, but that's a Saturday so we're going to send out the notices a day early. And then there's a lot of deadlines that we asked you all to think about as you're working on your non-compete applications. One of those was getting your staff trained and ready to go, so you're able to hit the ground running. With the shortened open enrollment period it's more imperative than ever that everybody be ready on November 1<sup>st</sup>. And so to that note, we asked you all to think about how many folks you wanted to have trained and to project that out through October first.

So throughout September and leading up to October, your project officer will be talking with you about the training and the recertification process. My colleague Leslie Wagstaffe is going to talk about our new training we are expecting to roll that out in early August. That will give you guys a couple months to get your teams through there and then hopefully be ready to go on day one. I'm just coming from the HIOS Reporting Metrics session and some of you were able to join me there and that was a wonderful learning opportunity for my colleague Sarah Barber and I. We walked through the reporting guidance. The big thing for everybody to know is that we're not changing the metrics this year, this is the first time that we're keeping the same metrics between budget periods. We are

## **Assister Update Session**

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trying to make our tools better support the work you do and how you work and trying to create more of a train the trainer experience. So a lot of times I think we're talking to Project Director level staff and actually giving you all something that you can use to then go and train your Navigators in the field and a way for them to easily record the work they do and send it back to you so that you can report it to us.

So we got a lot of great feedback on our new tools. We are going to be taking that feedback back and updating our guidance for this coming Fall and also updating a couple tools to use. And our plan is to have several TA webinars with you all in September and we are going to encourage you to invite your Navigators as well so they can learn here about how we're looking at the metrics, what we're looking for and hopefully help kind of get every on the same page. I was really happy last year with the data and the quality of the data has just improved tremendously over the last five years. I'm really excited to see this year how much better we can get.

The last thing I want to highlight is as I mentioned training will be going live in early August once again we're going to have a recertification track for Navigators who are currently certified as well as a new curriculum a new training for those who are new to Navigator work, or maybe new to an organization. So at this point I'm going to turn things over to my colleague Delia Jones McHorgh she's going to talk a little bit about the CAC program.

Delia Jones- McHorgh:

Thanks Gian. And good afternoon everyone. Before I start talking we're going to switch gears just a little bit and stop talking about

## **Assister Update Session**

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*Gian Johnson, CMS*

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our Navigator program but to begin talking about our CAC program. What I wanted to share and I thought it would be really neat to share some interesting facts about the CAC program with you all. Did you know that in the CAC program that we have 2,952 certified application counselor designated organizations? That's a lot. The majority of our organizations fall into the Health Services category and that includes those organizations that are federally qualified Health Centers, community health centers, Hospital, Health Systems. That number is nearly 1,900. The next largest category that we have of CDOs are from Social Services organizations. And again, it's about 700 of those organizations. We have a relatively small group of City, local, government agencies that are also part of our CAC program and it's approximately 40 organizations and the remaining organizations fall into the other category, so it could be a hodgepodge of different types of organizations.

Also I wanted to share with you that in terms of our largest subspecialties areas this includes anywhere from Behavioral Health to Mental Health Organizations, faith-based organizations, Tribal entities and just general public health services that are being offered. And I'm sharing all of this with you all just to simply say thank you for all of the work that you do to serve consumers in your communities. And it doesn't matter if you're from the most rural parts to the most urban sectors that we have. Your dedication to providing enrollment assistance to individuals is invaluable. And because you all have such expertise, we encourage you to collaborate with other Navigator organizations and other CDOs in your area just so that you can share that wealth of information.

So now I'll just kind of move on into some of the more specific program updates that we have. The, CAC program team, we are working on a

## **Assister Update Session**

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*Sarah Barber, CMS*

number of data management initiatives that we have that we think will support our ultimate goals for our program operations. Since what you do is extremely important to us, we want to be able to help better understand the work that you do and this is one of the main reasons why we're having our data management initiatives.

So the first one deals with the importance of using assigned CAC IDs. We want to encourage our CDO's to assign the CAC IDs to their individual CACs prior to registering and taking the MLMS training. This is really important. We want to emphasize that because this change will really help us to begin to track which CACs have taken training and if there are future refresher opportunities for eligible CACs we want to be able to afford the opportunity for of those select CACs. Also as it relates to using assigned CAC IDs, we want you to please remember to add your CAC ID to your consumer application whenever you're assisting a consumer, please use your CAC IDs. Again this information will help us to understand which of our CDOs are assisting consumers and we will be able to provide some more targeted Outreach to you all.

So moving forward I just wanted to share a little bit more about the second data management initiative that we have. And this deals with enhancing our systems, our internal system to a better manage your organizational information. This is where I say, "Team work makes the dream work" and we really, really encourage you all to work with us and make sure that we have the most updated information from you all, including -- we want you to reach out to us to let us know if your organization's name has changed, if your key contacts have changed, or if your service delivery areas have changed. Please, we ask that you reach out to us. Our program team is here to help, so we just really want

## **Assister Update Session**

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you to know where to find us. And you can find us via reaching out to the CAC questions inbox and that is [CACquestions@CMS.hhs.gov](mailto:CACquestions@CMS.hhs.gov), okay.

So I'll take a little bit of a break and switch gears again and just provide a general reminder regarding Find Local Help. And this reminder is both applicable to our Navigator grantees as well as our CDOs. If you are a CDO and you want to post a listing to Find Local Help, please remember to select CAC as your assister type and along with all of the other required fields for submitting that request. And likewise, if you are a Navigator grantee we kindly ask that you select Navigator as your assister type. So the reason why we ask this is that we really want to make sure that your listing gets posted timely and then it filters to the appropriate team so that they can review your content, approve it and then within 24 to 48 hours your listing can be posted. Okay?

Very quickly here, I just wanted to put another plug for Find Local Help, and share with you that we are updating the look and the feel for Find Local Help to make it more modern and have a more modern presentation with the content and just the overall design that is applicable for both the desktop applications and mobile applications. So stay tuned for that. We do anticipate that we will release the new layout prior to open enrollment. What will happen is, we will reach out to you either from the Navigator team or the CAC team to make sure that your content on find local help is accurate. So stay tuned for that as I said. Now right now I'm pretty much done with our program updates and reminders, I think it's probably time for a quiz. And you all are used to that. Okay?



## **Assister Update Session**

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So we're going to have a little bit of fun here. So, the first question is a true or false question. Navigator organizations or certified application counselor designated organizations can reassign previously issued Navigator or CAC IDs. Okay, let's take a moment before and see what we have here. I'm seeing some interesting things. I was hoping to see 100% false, but you know that's life. We would like to have each individual assister to be assigned a unique ID. This ID assignment should only be given to one assister at your respective organization and never, never, never, ever, ever reassign to anyone else. So, doesn't matter if they leave, come back don't reassign it. The reason why we say this is because this really helps us with tracking information. We use this in different ways. We can identify which individuals have taken training, one. And two, it helps us to identify individuals who may be eligible to take any refresher training. For example, with our eligible Navigators may take an abbreviated course for MLMS purposes. And then the third thing is that it helps us to identify which assisters are actually supporting consumers with application assistance. So please make sure that you never, ever reassign your assister IDs. And if you want to think of it like this, your ID should stick to you like glue. It helps me.

Okay so we have one last question for you. And this one doesn't have a right or wrong answer, but rather it helps us to gauge your primary -- how you primarily receive information. So let's see what we have here. What is your primary source for program updates? Wow! That's it, well okay so let's see what we have here what is your primary source for program updates. Wow! That's it. Okay, it's coming, it's coming. Okay, sure. I was just kind of stuck on the numbers as the graphs are going up and down here, so I'm getting used to the technology. In the first column we have, A, Newsletter we have about 27%. 30% receive their information from newsletter. The highest one that we have here is from the assister

## **Assister Update Session**

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webinars at 43% and changing. C, project officer updates and monitoring calls, we got 17%. Other Navigator organizations not so much. Other CDO 's, and again not so much or other advocacy organizations. So clearly it looks like the assister webinar is the best source of information, or the primary source of information for any program updates. So, thank you all for participating, this is really great and we want to make sure that we have the opportunity now to share some information about training and a little bit more information my colleague Leslie will come and talk to you more specifically about those items so thank you.

Leslie Wagstaffe: Thanks Delia and I'm Leslie and I feel like there's a lot of pressure on me to give you a lot of updates about this assister training. I think each person mentioned that I was going to come up here and talk to you about the training. So the weight is on my shoulders, but that's okay because I think I can carry it. But before we get into the assister training updates, I have one update for you regarding the quality rating system. CMS will be continuing a second year of consumer pilot testing of the display of the quality rating information during the next open enrollment period. And this will primarily impact the assisters from two FFM states; Virginia and Wisconsin because they'll be continuing the pilot that they began in the first year.

And in those states the consumers will be able to see star ratings when they're shopping for a plan through Healthcare.gov. These states were selected because they have a high number of issuers on their marketplaces and there's relative variation in the star ratings. However, consumers in other states that use healthcare.gov will not be able to see the quality data ratings during the 2018 open enrollment period. States that operate their own marketplaces will have the option to display star

## **Assister Update Session**

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*Gian Johnson, CMS*

*Sarah Barber, CMS*

ratings for their plans and for more information on this please see the marketplace quality initiatives page on [cms.gov](https://cms.gov), or you can contact marketplace [quality@CMS.hhs.gov](mailto:quality@CMS.hhs.gov) and you can also just stay tuned to us and one of our assister webinars or newsletters, which I see are very helpful. We will provide more information on this as this rolls out a little bit either later this summer or early in the fall.

So, on to the assister training. We're really excited to announce several changes to the 2018 assister training. We took the time and received a lot feedback from assisters and key stakeholders about ways that we could improve the training and the training experience for everyone. And some of the things that we heard were that: number one- it would help if we broke down ideas and concepts into manageable chunks. It would help if we introduce general ideas before delving deep into complex scenarios. It was also suggested that we provide more examples that illustrate rules in practice. And then also we heard that it would also help if we organized the training according to the application process on [healthcare.gov](https://healthcare.gov). A lot of head nodding on that one. So we've done that and so we're really excited to roll this out to you guys— but before we begin, I have a little video to show that will give you a little flavor of the look and feel of the new training. But here's some of features to watch out for; there's a user-friendly interface, and there is a lot of coach assistance and the coach will guide people through different scenarios and kind of explain how key points relate to other things, so we're not just throwing a whole bunch of terms at people and not really explaining the linkages. And the coach is speaking directly to the assisters.

So I think it'll be a little bit more responsive than what we've seen in the past. They're also guided enrollment scenarios and dynamic interactions

## **Assister Update Session**

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*Deborah Bryant, CMS*

*Gian Johnson, CMS*

*Sarah Barber, CMS*

that will allow you to click and expand on things if you want to learn more on different topics. And then finally there are realistic marketplace simulations where you'll be able to follow, let's say, a mixed immigration status family through several of the different modules in the course, so you can see how different scenarios and things apply to this particular family. So we feel like it gives you a little bit more of a feel for how it would be and it's probably particularly helpful for those who are new, we're going to really help people so that on the day one you hit the ground -- we've thrown a lot of scenarios at you. So without any further ado, let me go ahead and play the video so you can kind of get an idea of what we're talking about. I don't know how to work the technology, I'm sure it will play shortly. Soon. It's okay we can stand here. I'm not shy. Do I need to advance the slide? Here it is.

[VIDEO PLAYING MUSIC].

Didn't that get you all excited? I will say it took a lot of discipline not to really dance up here. I've been listening to that music, I actually hear it in my dreams at night because I've been playing the video over and over, yeah. But before we go our separate ways for the evening, once again we'd like to give you the opportunity to submit any questions that you may have, that you know burning questions that you may have had that you haven't been able to get answered just yet. And we're going try and answer those tomorrow in the assister town hall. If you can open up your folders and pull out one of those blank index card, you can write down your questions and then we have the clear punch bowls in the back of the room for those in the auditorium to submit additional questions. For those of you who are webcasting right now, we received your questions through the ask CMS questions live survey. I understand that it is closed already

## **Assister Update Session**

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for the day but we will be taking those questions and incorporating those into the ones that we try to get to tomorrow.

And we also solicited questions about a week ago, so we have several entry points for questions and we'll try to get to as many of those as possible tomorrow. For those that we are unable to get to, we will incorporate in a webinar, or in a newsletter article to the ones that have answers right now, later on. So it is very important to us that you provide us with your questions. After that I think I'll just leave you guys to drafting your questions and we'll see you bright and early tomorrow morning for day two of the Assister Summit. You guys have a good night.

Stacey Plizga:

I would like to thank our speakers for -- you can't leave yet, I'm not done. I have very important announcements to make. So I do want to thank our speakers for the updates and the information on the 2018 Assister Training. A couple things, you can pick up information on the back tables of this auditorium from any of the other sessions from today, if there was breakouts that you were unable to participate in, there is material back there, so please feel free to grab that. Remember to take all your things with you and we do have outside of the auditorium we have bins for both garbage and recycling items. Tomorrow if you are traveling and have luggage, we ask that you try to leave the luggage in your car, if you are unable to leave it in your car, if you can leave it at the hotel with the concierge that would be great, if you have no other option than to bring it with you, we do have limited space in the back of the Grand Auditorium for you to put your luggage, but please note that we are not responsible for any of your things. Also there will be additional material online after the summit so after tomorrow they'll be additional materials posted. There are many materials posted right now, but they have more.

## **Assister Update Session**

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And day two of the Summit, which is tomorrow will begin promptly at 9 a.m. Please make sure you come back to join us for discussions on optimizing consumer experience. Please bring those folders with you, there will be more handouts tomorrow for you to place in those folders and in addition there is the feedback survey that we will be asking you to fill out and leave with us at the end of tomorrow. And I think that's it. So I'd like to thank all of our in-person guests and our webcast guests, thank you so much and thank you for staying to hear my announcements.