community partners

TIP SHEET

For Connecting your Clients to Care

Post-enrollment services start at intake:

- If your client is on Medicaid/SCHIP, make sure you're listed with the State agency as a contact, if possible, to make sure you get all important notices (eligibility, termination, etc.).
- Tell clients you'll be following up with them to make sure everything works. If they are expecting to hear from you, they won't resent your call.
- Start member education right away – repeat at every contact.
- Encourage people to call you with questions or problems. Some people don't want to bother you.

Member Education:

- Be thorough. Check that clients understand the following:
  - How managed care works (the function of a primary care provider, how to change the PCP, how to get a referral for specialty services)
  - Why it's important for adults and children to make well visits
  - What preventive services are available and why they're important
- Give clients something to take away (Welcome Kit, checklist, for example) – but go through it with them first.
- Make sure they take away something with your telephone number on it. Let them know you're in the phone book, in case they lose the number.
- Invite their questions.
- Use the opportunity to ask if they have unmet medical needs so you can steer them in the right direction.
- Explain client's right to change provider, appeal denial; stress what they need to do to keep coverage (fill out and mail appropriate renewal/redetermination forms, notify of address change). Let them know you can help if they need it.

Follow-up:

- Develop a tickler system to remind you when follow-up should be done.
- Phone calls are best; calling at night is helpful if your program can support it.
- If you can't call at night, ask about other options: Can you leave a detailed message on an answering machine? Can you call at work? Make a "phone date" for their lunch break at a specific date and time.

General:

- Nurture relationships with State Medicaid agency staff, other providers' office staff, (hospitals, health centers, private doctors' offices, pharmacies), local community groups.
- Keep up-to-date files on coverage program changes.
- Keep up-to-date files on other resources for people who don't qualify for coverage programs.
- Attend any networking meetings that keep you informed of program and policy changes.
- If clients reach you through a switchboard, make sure all the operators know exactly what you do.
- Let your supervisor know what you're doing. This is important and time-consuming work, but it's not easily seen by people who aren't doing it. You need their support.