Maximizing Enrollment for Kids
Making Medicaid and SCHIP Work

Maximizing Enrollment Self-Assessment Toolkit Stakeholder Questionnaire: Call Center Staff

Introduction: Your state has begun to assess its Medicaid and CHIP enrollment and retention policies and procedures using the Maximizing Enrollment self-assessment toolkit. The toolkit includes multiple components, one of which is this questionnaire. By providing answers to these questions you are helping your state's Medicaid and CHIP program administrators learn about your unique experiences with the current systems for enrolling and retaining children, and about changes you think could improve enrollment and retention of eligible children.

Section I. Application Processes for Medicaid/CHIP Enrollment

1. Please describe, briefly, your role in the application process.

2. Regarding Medicaid/CHIP, what are the top five reasons parents call your call center?

3. What percentage of callers elect to complete an application online with call center assistance?

4. Does the call center track approval and denial rates by application method?

    4.1.   What are the major reasons applications are denied for each method?

5. When parents have tried to fill out the application in advance, or when you are filling it out with them, are there particular <u>questions</u> that are often hard for them to answer?

    5.1.   Which ones?

    5.2.   Which types of documentation do parents seem to have the most difficulty providing?

6. When parents don't have the information they need, what usually happens?

    6.1.   Do they call back and provide it, or are many applications never completed?

    6.2.   Do you allow self-attestation if some documentation is missing?

    6.3.   Can you search for information using third party data sources for them?

    6.4.   What kind of assistance can parents get specifically related to identity or citizenship documentation for their children when they don't have it?

7. How long do parents typically spend enrolling their child (from the time they call, until they hang up, taking into account multiple calls, if needed)?

8. If a submitted application is later found to be missing required information, what steps do you take to obtain the information from the family once they have disconnected the call?

   8.1. Do you send a letter, make a call?

      8.1.1. About how many contacts would you typically make before giving up?

   8.2. Are you generally successful in retrieving the missing information?

      8.2.1. Why or why not?

9. Do you track the number of completed and incomplete applications or incomplete applications that are denied?

Application Languages

10. If a parent needs an <u>application</u> in another language, can they get it from the call center?

    10.1. In which languages do you have applications available at this location?

11. Are there other languages in which some parents need an application that you are <u>unable</u> to provide for them?

    11.1. If so, which ones?

12. If a parent needs <u>application assistance</u>, in what languages can the call center staff provide assistance?

    12.1. Is assistance available during all open hours, or just some of the time?

    12.2. What do you do if there is no one available to provide application assistance to a parent in their native language?

13. Are there other languages in which some parents need application assistance that you are <u>unable</u> to provide for them?

    13.1. If so, which ones?

Perspective of Parents in Applying for Children's Coverage

14. Do you think parents feel comfortable calling the call center to apply for coverage for their children?

14.1.   Why or why not?

14.2.   Do you think some parents are fearful about asking for insurance for their children?

14.2.1.   If so, why?

15. In general, do you think parents feel comfortable asking for help from call center customer service reps?

15.1.   Are there changes your program could make that would make it easier or more comfortable for parents to seek assistance from customer service reps?

Renewal Process

16. Please briefly describe your role in the renewal process.

16.1.   For the parents who you contact by phone regarding renewal reminders, how is a renewal initiated?

17. If parents have received a call or letter about renewal, do they generally understand the renewal instructions, or are there some parts of the renewal process they find confusing?

17.1.   What confuses them?

18. Do parents have to document income at renewal?

18.1.   Do you have a way to look up the parent's income?

19. If the parent does not respond to a renewal call, do you attempt to contact them by letter?

19.1.   Is so, does that usually work?

19.2.   Do you track rates of families you are able to reach?

19.3.   Do you track rates of renewal?

20. Do you work with any community groups to help you contact parents?

21. Can you think of ways to make the renewal process work better for parents?

Section II. Medicaid/SCHIP Coordination

22. In what ways do you coordinate Medicaid and CHIP applications within the same family?

22.1.   Do you do any of the following?

22.1.1.   Synchronize renewal of all children in a family, even if they
entered the programs on different dates?

22.1.2.   Review eligibility for both programs?

22.1.3.   Other? Please describe.

23. If a child appears to be eligible for a different program at renewal, what steps do you take to
facilitate the transfer?

23.1.   If an applicant for one program appears to be eligible for the other, can the
application be transferred and fully processed without contacting the family, or is
additional information needed?

24. What suggestions do you have for making it easier to coordinate coverage in a family that
has members on both Medicaid and CHIP?

Information Systems Integration and Coordination

25. Is information shared between Medicaid and CHIP <u>eligibility</u> systems (specifically call
center, health plan, local offices)?

25.1. If so, what information is shared <u>electronically;</u> what is shared <u>manually</u>?

26. Are staff and information systems "integrated" or well-coordinated between Medicaid and CHIP?

26.1. Where does the integration or coordination work well?

26.2. Where does integration or coordination need to be improved?

26.2.1. Are Medicaid staff "co-located" on CHIP eligibility vendor sites?

26.2.2. Are eligibility policies and procedures consistent between Medicaid and CHIP (where possible)?

27. Can you briefly describe some key ways that the call center has used information technology to facilitate data sharing, improve the speed of processing applications, reduce errors, or otherwise overcome coordination barriers to enrollment and renewal?

28. Are health plan call centers well coordinated with your call center?

28.1. Where does integration and coordination need to be improved?

29. As a customer service representative, do you feel that you consistently get the kind of information you need to do your job effectively?

29.1. What kinds of information or data would help you, your staff, or colleagues reduce administrative barriers to enrollment and renewal more effectively?

30. Are there any additional problems you are concerned about regarding the interface between the eligibility system, your state's Medicaid Management Information System (MMIS), and the health plan's enrollment system?

30.1. If so, please describe.

Staff Training, Workload and Performance Review

31. How long have you been a customer service representative?

32. How effective was the training you received when you became a customer service representative?

    32.1.   In what ways do you think the training could be improved?

33. Do you feel staff get the training and guidance needed to keep up to date with program changes regarding enrollment and recertification?

    33.1.   Are there policies or procedures that are particularly difficult to follow?

    33.2.   Where or who do staff turn to if there are problems or questions about a case (e.g., online assistance, codebook, supervisor, colleague)?

34. Has training included information or seminars about the importance of health insurance to low-income people, the challenges that low-income families face?

    34.1.   If so, did you find this helpful?

35. Do staff have target call volumes they are expected to maintain?

    35.1.   Is so, how were these determined?

36. Are staff evaluated based on particular standards or expectations?

    36.1.   How many calls are handled, number of eligible children enrolled, number of eligible children retained at recertification?

37. Do staff receive any incentives for enrolling or retaining eligible children?

    37.1.   Is so, please describe.

38. Do staff receive any other kinds of recognition for a job well done?

39. Are staff encouraged to share ideas about how to improve the enrollment or renewal process?

Organizational Culture

40. What would you say is the overall "message" or philosophy from program leadership about enrollment and retention?

41. Have you noticed any particular changes made in your call center in recent years to make parents feel more comfortable about enrolling or renewing their children's coverage, that is to make the enrollment and renewal processes easier and more friendly for parents?

    41.1. For example have any of the following changes occurred?

        41.1.1. Changing the language used, such as describing individuals applying and enrolling to positive terms like "customers" that stress a culture of service?

        41.1.2. Conducting "internal marketing" to staff to promote the goal of enrolling eligible families, rather than emphasizing compliance with rules and processing cases?

        41.1.3. Adding incentives or changing expectations for eligibility workers to reflect a stronger emphasis on enrollment or retention?

        41.1.4. Other consumer (parent) satisfaction surveys, focus groups, outreach programs, brochures or other written communications?

42. Are there any other recent improvements your call center has made to simplify enrollment or renewal that you think have been especially helpful to parents, or made your job easier to do?

43. What kinds of changes do you think would most help call center reps do their job more easily as far as helping parents enroll and keep their eligible children on public coverage?