Engagement and Advocacy for O&E Staff

August 18, 2016

Welcome to the Outreach and Enrollment Distance Learning Series

All lines are muted. Please use chat to ask a question to the chairperson.
2016 O&E Distance Learning Series: Upcoming Events

• Visit the CHAMPS Distance Learning Page for more information
  • Habits of Highly Effective Assisters – September 22, 2016
Community Health Association of Mountain/Plains States (CHAMPS)

www.champsonline.org
Colorado Community Health Network (CCHN)

www.cchn.org
Presented by:

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Make Your Voice Heard: Enrollment Assisters in Public Policy
Families USA: the voice for health care consumers

Families USA works hard to achieve high-quality, comprehensive, and affordable health care for all Americans.

We deserve a health care system that works for everyone. Since the passage of the Affordable Care Act, our country has made great strides in making health coverage affordable, comprehensive, and available to those who need it—including individuals and working families who were vulnerable to gaps in the health care system.

- Healthcare Affordability
- Dental/Oral Health

Through the health insurance marketplaces and consumer protections, health coverage is now available to those who didn’t have it before.

Getting Americans enrolled in health coverage is critical for a good health care system.

Health Equity

Health System Transformation
You Give Consumers a Voice!

In OE3, 5,000 assister programs helped 5.3 million consumers
Your Unique Perspective

Public Officials

Assisters

Consumers
What's in a word?

1 advocate
noun | ad·vo·cate | /ˈad-vo-kət, -kāt/

Simple Definition of advocate

: a person who argues for or supports a cause or policy
: a person who works for a cause or group
: a person who argues for the cause of another person in a court of law

Full Definition of advocate

1 : one that pleads the cause of another; specifically : one that pleads the cause of another before a tribunal or judicial court
2 : one that defends or maintains a cause or proposal
3 : one that supports or promotes the interests of another
What is Advocacy?

- Research
- Advocacy
- Policy-maker education
- Media outreach
- Coalition building
Can Assisters Advocate?

- Public Policy =
- Advocacy =
- Public Education
Conduct **public education** activities to raise awareness of the availability of qualified health plans.

Distribute **impartial information** about enrollment in qualified health plans and the availability of premium tax credits.

Facilitate **enrollment** in qualified health plans, Medicaid, & CHIP.

Provide **referrals** to health insurance consumer assistance or ombudsman, or any other appropriate state agencies, for any enrollee with a grievance, complaint, or question regarding their health plan.

Provide information in a manner that is **culturally and linguistically appropriate** to the needs of the population served by the Exchange.
We All Wear Many Hats

- Eligibility worker
- Outreach specialist
- Event planner
- Therapist
- Health insurance advisor
- Care coordinator
- Health educator
- Financial advisor
What Balance Makes Sense for You?

Public Education

Direct Assistance
**Assisters are Advocates!**

<table>
<thead>
<tr>
<th>Nonprofit</th>
<th>Federal funding</th>
<th>State regulations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Cannot endorse a specific candidate</td>
<td>• Federal restrictions on lobbying</td>
<td>• Many states have restrictions on assister activities</td>
</tr>
<tr>
<td>• Limited in ability to promote specific legislation</td>
<td>• Some advocacy falls within scope of grant duties</td>
<td></td>
</tr>
<tr>
<td>• Focus on the issue</td>
<td></td>
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</tbody>
</table>

*Federal funding*

**Federal restrictions on lobbying**

**Some advocacy falls within scope of grant duties**

*State regulations*

**Many states have restrictions on assister activities**

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**LEARNs ASSISTERS**

**CAN DO ADVOCACY**
And: Not “Either/Or”

Direct Service

Policy/Public Education
Together We Educate & Inform Policy

**Legislative**
- Meetings on the Hill
- Testimony

**Executive**
- Meetings with agencies
- Commenting on Regulation

**Judicial**
- Media
- Public Opinion
How Can You Engage?

Federal

State

Local
Steps to Get There

1. Identify your issue
2. Pinpoint your audience
3. Develop your message
4. Practice your delivery
Who to Engage?

- Media
- State Department of Insurance
- Medicaid Agency
- U.S. Department of Health and Human Services
- State Primary Care Association
- Insurance Company or MCO
- State Advocacy Organizations
- National Advocacy Organizations
- Elected Officials
Examples of State Levers

- State Medicaid Agency
- State Department of Insurance
- State Legislators
- State-Based Marketplace
Examples of National and Federal Levers

- HHS Regional Office
- HRSA Regional Office
- Consumer Support Group
- Centers for Medicare and Medicaid Services
- Congressional Representation
Once a Law: Rulemaking Process

Agencies issue proposed rule → Public comment period → Final rule
Policy Priorities

- Assister funding, training, and resources
- Improve the Marketplace application and call center
- Encourage the adoption of streamlined enrollment
- Medicaid expansion to eliminate coverage gap
- Coverage affordability
- Adequate coverage
Changes to Special Enrollment Period Process Could Hurt Consumers

At the end of February, the Center for Medicare and Medicaid Services (CMS) announced plans to change the process for consumers who enroll in insurance through the federal marketplace outside of normal open enrollment periods (SEPs). While the new process is not entirely laid out yet, we have some clues about how the changes will negatively affect low-income consumers and likely violate basic principles the new process should serve consumers.

Special enrollment period is a vital aspect of health insurance.

Consumers who experience gaps in health insurance and an opportunity to return to the marketplace to adjust their plans are eligible for SEPs. These SEPs are a vital aspect of the marketplace, given that the marketplace was created to give consumers flexibility and the opportunity to make informed decisions.

Comments to Proposed Documentation Requirements for Special Enrollment Periods

March 4, 2016

Families USA is extremely disappointed and has deep concerns about the recent changes to the process by which consumers will enroll in coverage through special enrollment periods. These changes, which will create barriers for consumers to enroll into coverage for which they are eligible and will likely lead to lower SEP enrollment overall. Even with the process that is used today, fewer than 15 percent of those who are eligible for SEPs utilize this enrollment opportunity, and we firmly believe CMS is taking a step in the wrong direction by making this process more difficult for consumers.

CMS has acknowledged that these changes have been created to weed out people who issuers have claimed have “abused and misused” SEPs. However, we have seen nothing but anecdotal evidence that consumers are “gaming” a system they are largely unfamiliar with. As noted above, consumers have limited awareness of SEPs to begin with and are far less likely to know how to fraudulently maneuver the SEP enrollment process. We believe the new process CMS is creating will serve to increase the very adverse selection that issuers are concerned about because those who are sick and need coverage the most will be the most motivated to complete the new cumbersome process required to enroll in coverage.

While we are strongly opposed to the new process, we do appreciate the opportunity to provide feedback. While CMS has asked for specific feedback on communicating with consumers about providing required documents and refining the confirmation process, we also wanted to take the opportunity to outline a general framework for how we hope the Special Enrollment Confirmation process will look. We encourage CMS to implement the process in a way that provides clarity and mitigates the number of processes for the consumer. We have incorporated feedback from assisters we work with around the country regarding these changes.
Another Example

[Image of a Health Insurance Marketplace application form]

**Health Insurance Marketplace**

Department of Health and Human Services
465 Industrial Boulevard
London, Kentucky 40730-0001

Julia Smith
[insert address]

[date]

Application Date: [date]
Application ID: 129808540

Important: Your Eligibility Results for Health Insurance Marketplace coverage

We reviewed your application to see if you can get health coverage through the Marketplace and help paying for coverage and health services through:

- A premium tax credit that can be used right away to lower your monthly premium costs
- Health plans that lower your out-of-pocket costs
- [State Medicaid name] (Medicaid) and [state CHIP name] (Children’s Health Insurance Program (CHIP)), which are joint federal and state programs that help with medical costs for people with limited income or special health care needs

Save this notice. It includes information about important Marketplace deadlines that may affect your eligibility for coverage, your costs, and your next steps.

**Your Eligibility Results**

Review the table below for the results of your application.

<table>
<thead>
<tr>
<th>Family member(s)</th>
<th>Results</th>
<th>Next steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Julia Smith</td>
<td>Can choose a health plan with lower copayments, coinsurance, and deductibles (DS)</td>
<td>Choose a health plan and make first month’s payment</td>
</tr>
</tbody>
</table>

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Strategies to Engage

Story-banking
Filing Complaints
Tracking Cases
Story Bank Toolkit

- Creating a plan
- Building infrastructure
- Collecting stories
- Developing stories
- Disseminating stories
Ways to Highlight Stories

- Social Media
- Organizational Blogs
- Outreach and enrollment events
- Earned Media
- Press events
Press release  March 23, 2015

Bipartisan House Package a Crucial Step Forward for Children’s Health

Bill Extends Nearly Two-Decade-Old CHIP Program That Has Helped Cut Children’s Uninsured Rate by More than Half

Washington, D.C.—Bipartisan leaders in the U.S. House of Representatives announced Friday the introduction of a bill to fund the Children’s Health Insurance Program (CHIP) for another two years. Families USA has supported CHIP since it was first developed in 1997 and worked to extend and strengthen the program ever since, recently writing to Congressional leaders in support of the package that is now being introduced. (Visit our CHIP resource center.)

Following is the statement of Ron Pollack, Executive Director of Families USA:

“The bipartisan introduction of legislation extending CHIP funding is largely to CHIP, the uninsured rate among children has been cut by nearly half. The five-year funding extension is essential so we don’t move backwards from this hard-won progress.”

“The bipartisan House leaders should be congratulated for coming together to support CHIP. The health care of at least 8 million children hinges on this decision, and with the funding calendar running out on September 30, governors and state legislatures need funding certainty now for their own CHIP-related budget deliberations, which are already well underway.”

“It is critically important for Congress to act swiftly. While funding for the current fiscal year ends on September 30, governors and state legislatures need funding certainty now for their own CHIP-related budget deliberations, which are already well underway.”

“Since its inception nearly two decades ago, CHIP has delivered needed coverage to children, and today’s action is important progress in making sure that the program will continue to be there for children who need it. While we would have preferred a four-year extension, the House bill has our full support.”

#ExtendCHIP

www.FamiliesUSA.org
As an Enrollment Assister, can you...?
As an enrollment assister, can you reach out to an elected representative during work hours and tell them to vote a certain way, for a specific bill?
As an enrollment assister, can you reach out to an elected representative **during your own time** and tell them to vote a certain way, for a specific bill?
As an enrollment assister, can you reach out to an elected representative and share your experience about your position and discuss the importance of an issue?
Making Your Voice Matter

Families USA produced the Public Policy Toolkit for Enrollment Assisters to give assisters an understanding of the legislative process and the tools they need to be effective advocates.

Enrollment Assisters Can Be Strong Messengers
Sign up for the Network

- **Weekly Newsletter**
- **Monthly Webinars**
- **Tools and Resources**

Sign up at:


Only 10 days left in this open enrollment period, and we are in the final stretch! Consumers who enroll in coverage between now and January 31 will get health coverage effective March 1.

This week’s newsletter shares recent resources, upcoming webinars, and a new FAQ section based on questions you’ve sent us.

Also, keep in mind that it’s not too late to register for our Health Action 2016 conference in February. Come network with other assists and learn new techniques for outreach, debriefing, and examples that highlight how enrollment work is year-round.

1. **Resources**
   - Be sure to share our [infographics](http://familiesusa.org) that highlight health disparities in communities of color and the importance of getting enrolled.
   - In the middle of all the primary debates this month, you might find yourself asking, “What can I do to motivate my community to get involved and vote?” Our [recent blog](http://familiesusa.org) highlights how enrolling in marketplace coverage is an opportune time to also register people to vote.
   - Kaiser Family Foundation released its [14th annual survey](http://familiesusa.org) today on Medicaid and CHIP eligibility and enrollment. The report highlights findings on enrollment and renewal processes in all 50 states.
   - The National Disability Navigator Resource Collaborative (NDNRC) recently released several new population-specific fact sheets, including one for assisting [consumers with traumatic brain injury](http://familiesusa.org). For the full series of population-specific fact sheets, click [here](http://familiesusa.org).
   - Looking for zip code data on this enrollment period? A new [ASPE report](http://familiesusa.org) shares the number of Healthcare.gov plan selections in each zip code through January 9. Enroll America created a [map view](http://familiesusa.org) of the plan selection data to compare how geographical areas are performing this open enrollment period compared to last year.

2. **Upcoming Webinars**
Questions?
Jessica Kendall
jkendall@familiesusa.org

Liz Hagan
ehagan@familiesusa.org

Contact us:
assisters@familiesusa.org
(202) 628-3030

Visit the Enrollment Assistance Resource Center:

Sign up for the Enrollment Assister Newsletter:
http://fusa.convio.net/site/R?i=GXX2tYWoaJhUPhjrCctNow
Voter Registration and Engagement for O&E Staff

Sophie Hagberg
CHAMPS Outreach & Enrollment Coordinator
8/18/16
Can nonprofit organizations engage in “political” activities?

YES! The IRS encourages nonprofit organizations to engage in voter registration and activation activities with the populations they support.
What are permissible political activities for nonprofit organizations?

- **Conducting voter registration**
- Hosting or co-sponsoring a candidate forum
- Distributing nonpartisan (non-party affiliated or neutral) sample ballots, candidate questionnaires, or voter guides
- Continue issue advocacy during an election
- **Educate voters on the voting process**
- Educating candidates on your issues
- Organizing Get-Out-The-Vote (GOTV) activities
- Encouraging and reminding people to vote
What type of political activities are nonprofit organizations and employees not allowed to engage in?

- Endorsing a candidate
- Making a campaign contribution or expenditure for a candidate
- Rating candidates on who is most favorable to their issues
- Letting candidates use the organization’s facilities or resources, unless those resources are made equally available to all candidates at their fair market value
Why should nonprofits conduct voter registration and education activities?

- **We can help close voter turnout gaps.**
  - The voter turnout among those contacted by nonprofits was 74%, six points above the 68% turnout rate for all registered voters.

- **Nonprofits are trusted messengers.**
  - A recent Harris Poll asked the public who they wished had more influence in political affairs, and respondents said they wanted nonprofits and small businesses to have a greater say in politics—second only to themselves! *(Nonprofit Vote)*

- **We increase turnout in traditionally underrepresented groups.**
  - People engaged by nonprofits to register to vote in the 2012 election were markedly younger, more diverse, and lower-income.
Voter Turnout in the 2012 Election

Overall Turnout: 68%
CHC Turnout: 75%

Source: Community Health Vote, 2012
2012 Elections

Voter Turnout by Race

Source: Community Health Vote, 2012
2012 Elections

Voter Turnout by Income

Source: Community Health Vote, 2012
Why should enrollment assisters conduct voter registration activities?

• Assisters already explain complex information in simple terms while remaining unbiased – voter registration requires the same skills.

• Human service agencies, health centers, and other direct service nonprofits are trusted messengers - clients know and already have a rapport with staff.

• Applicants are coming to the health center for enrollment appointments with appropriate identification to get through the enrollment process, making them eligible to register to vote on the same day.
National Voter Registration Act of 1993 (NVRA)

- Sometimes called the “motor voter” act
- The NVRA sets forth certain voter registration requirements with respect to elections for federal office
- “Any office in a covered State that provides either public assistance or state-funded programs primarily engaged in providing services to persons with disabilities must offer voter-registration services.” (NVRA Section 7)
- **Public Assistance** includes Medicaid, SNAP, CHIP, WIC, TANF, and other state programs.
- States are also required by Section 7 to designate “other offices” within a State as voter-registration agencies.
- **Idaho, Minnesota, New Hampshire, North Dakota, Wisconsin, and Wyoming** are exempt from the NVRA.
General Voter Registration Information

• Voter registration rules vary by state
• To find out how to register voters in your state:
  • **Community Health Vote State Materials:** [http://communityhealthvote.net/material/](http://communityhealthvote.net/material/)
  • **Project Vote:** [http://projectvote.org/](http://projectvote.org/)
• *Always be sure to check your state’s voter registration procedures before registering clients!*
• Things to look out for:
  • Does my state offer same-day voter registration?
  • Does my state have voter ID laws?
  • Does my state allow third parties to do independent voter registration?
  • Does my state have voter registration?
Registering to Vote in Region VIII

- **Colorado** and **Utah** allow residents to register to vote online.
- **Montana** and **South Dakota** allows voters to register by mail.
- **Wyoming** requires registration in-person, or for the form to be notarized before being mailed in.
- **North Dakota** does not register voters.
- **Colorado** utilizes a mail-in ballot system.
- **Colorado**, **Montana**, and **Wyoming** allow Election Day registration.

**Voter ID Laws**

- **Colorado, Montana, Utah** requires voters without ID to cast a provisional ballot.
- **North Dakota** requires photo ID to vote.
- **South Dakota** requires voters without ID to sign an affidavit verifying name and address.
- **Wyoming** does not require registered voters to show ID.
Working with Candidates and Public Figures

- Working with candidates and public figures who are elected officials is permissible by the IRS, provided certain rules are followed.
  - If the person is a candidate running in a contested race and is attending your event in the capacity of a candidate for office, you must invite all other candidates in the same race.
  - If the person is a public figure attending in their capacity as a public official and not running for office, you do not have to invite anyone else: however, the person should refrain from making any partisan statements or discussing current candidates.
Best Practices for Voter Registration for O/E Staff

• Appoint one staff member to be in charge of coordinating voter registration activities
• Train front-line staff to ask every client if they would like to register to vote – consider “ask me about voter registration!” pins for trained staff
• Use a follow-up form
  • Inform clients of their ability to register when they come in for other services, and allow them to opt-in to reminders and other information on voting
• Engage clients in the waiting room
• Post signs informing clients of the opportunity to register to vote
More Information:


- Community Health Vote: [http://communityhealthvote.net/](http://communityhealthvote.net/)

- Nonprofit Vote: [http://www.nonprofitvote.org/](http://www.nonprofitvote.org/)

- Project Vote: [http://projectvote.org/](http://projectvote.org/)

- Native Vote: [http://www.nativevote.org/](http://www.nativevote.org/)
Contact Information

Sophie Hagberg
CHAMPS Outreach and Enrollment Coordinator
sophie@champsonline.org
303-867-9544
QUESTIONS?
Type any questions into the chat box at the bottom of the screen.