



[Outreach and Enrollment Distance Learning Series]



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.

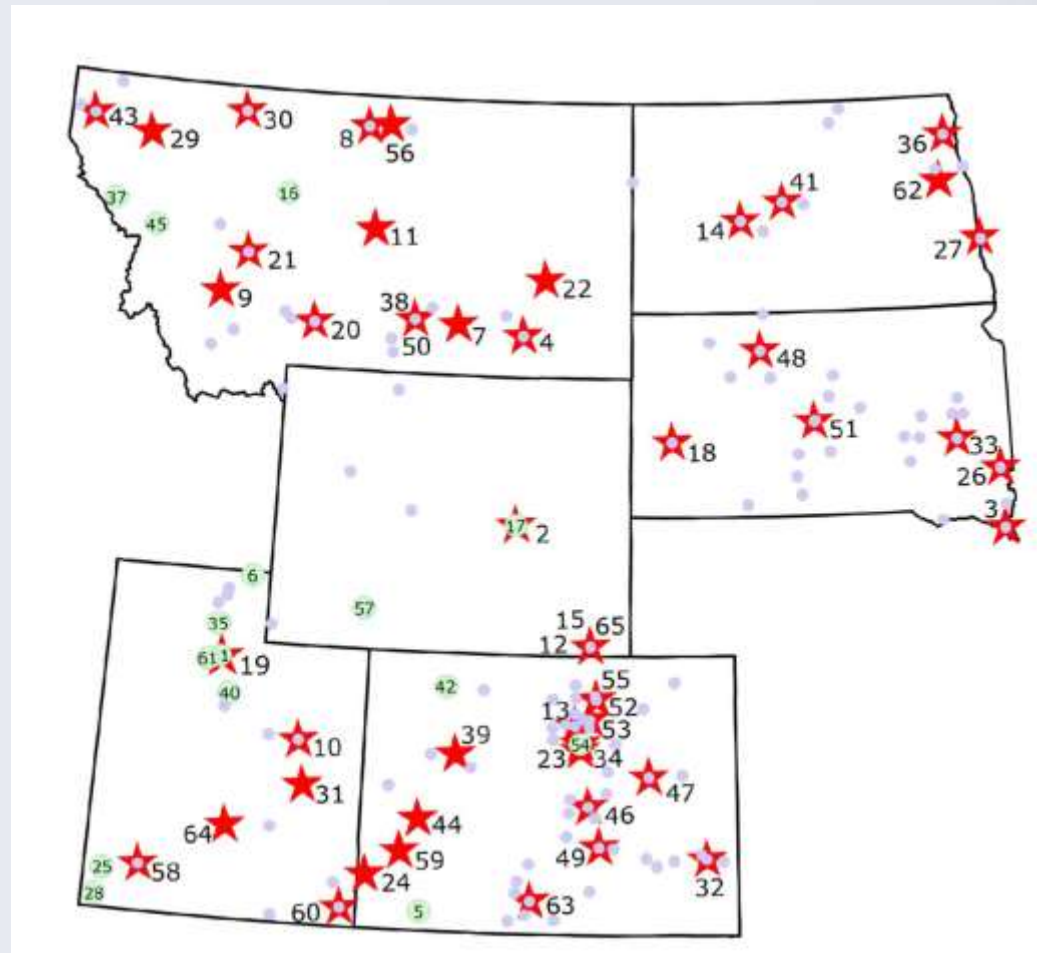
2016 O&E Distance Learning Series: Upcoming Events

- 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**)



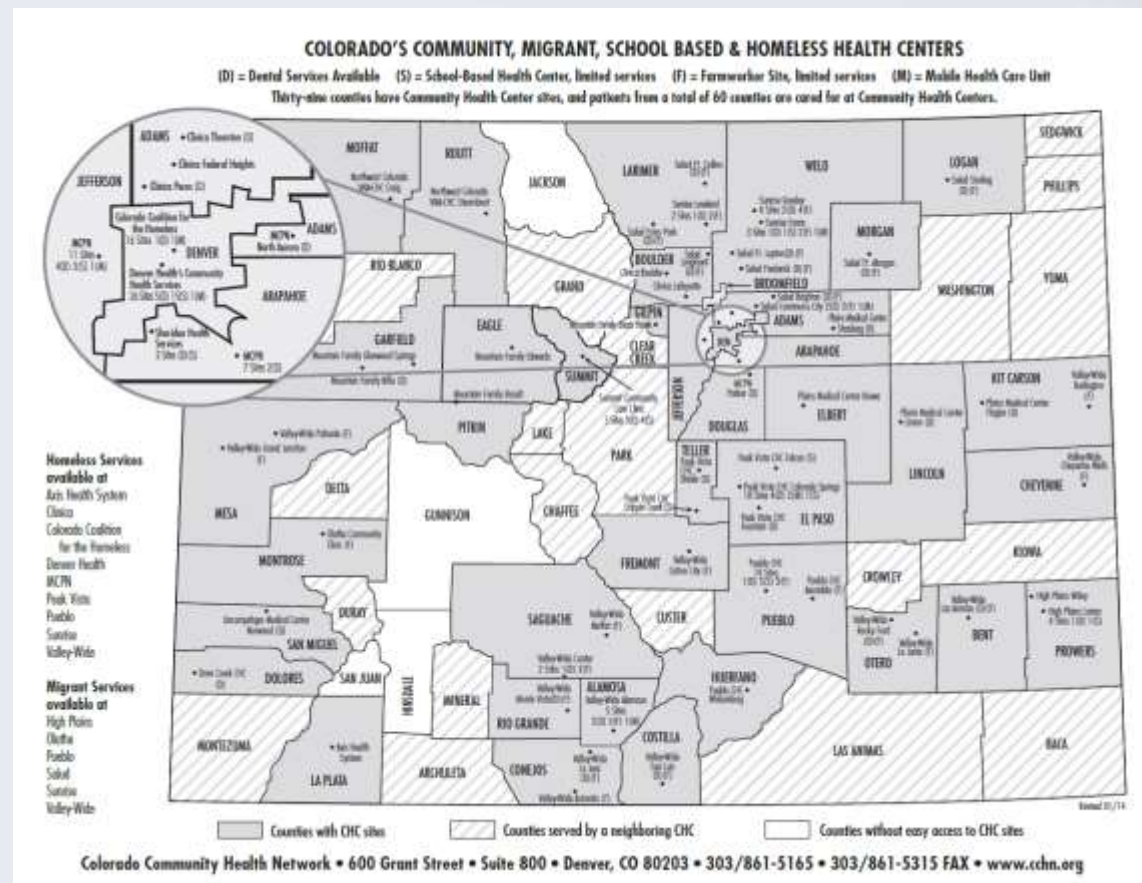
www.champsonline.org



Colorado Community Health Network (CCHN)



www.cchn.org



Presented by:

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Make Your Voice Heard: Enrollment Assistors 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

Achieving equity in access to high-quality health care makes healthier, safer, and stronger communities.



Medicaid



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



Health Equity



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



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?

www.merriam-webster.com/dictionary/advocate



SINCE 1828

MENU

¹advocate

noun | ad·vo·cate | \ˈad-və-kət, -kāt\

Simple Definition of ADVOCATE

Popularity: Top 1% of lookups

- : 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

Examples: ADVOCATE in a sentence ▼

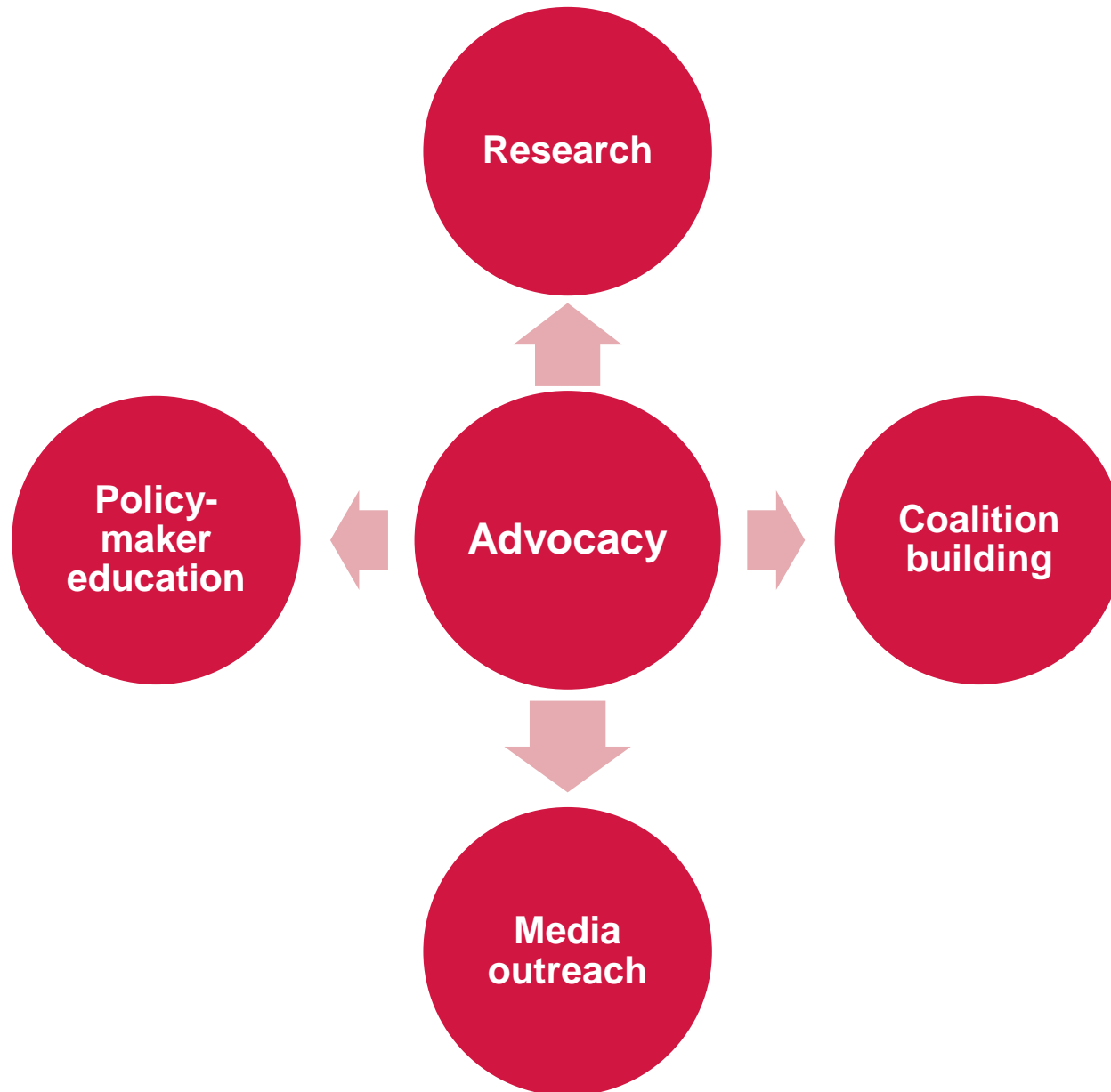
Editor's note: Did You Know? ▼

Tip: Synonym guide ▼

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?



Can Assistants Advocate?



- Public Policy =
- Advocacy =
- Public Education

How Many Hats Do You Wear?

Conduct **public education** activities to raise awareness of the availability of qualified health plans

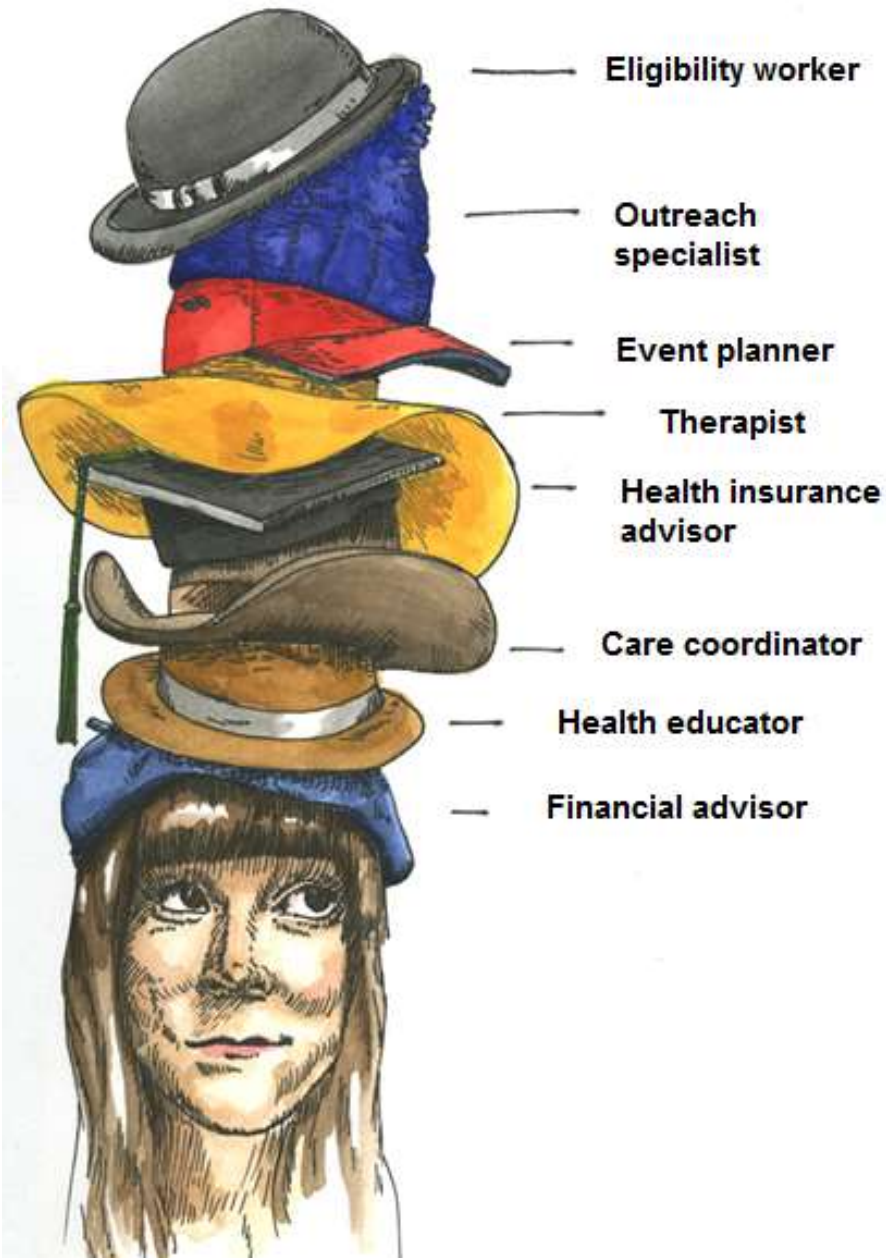
Distribute **impartial information** about enrollment in qualified health plans and the availability of premium tax credits

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

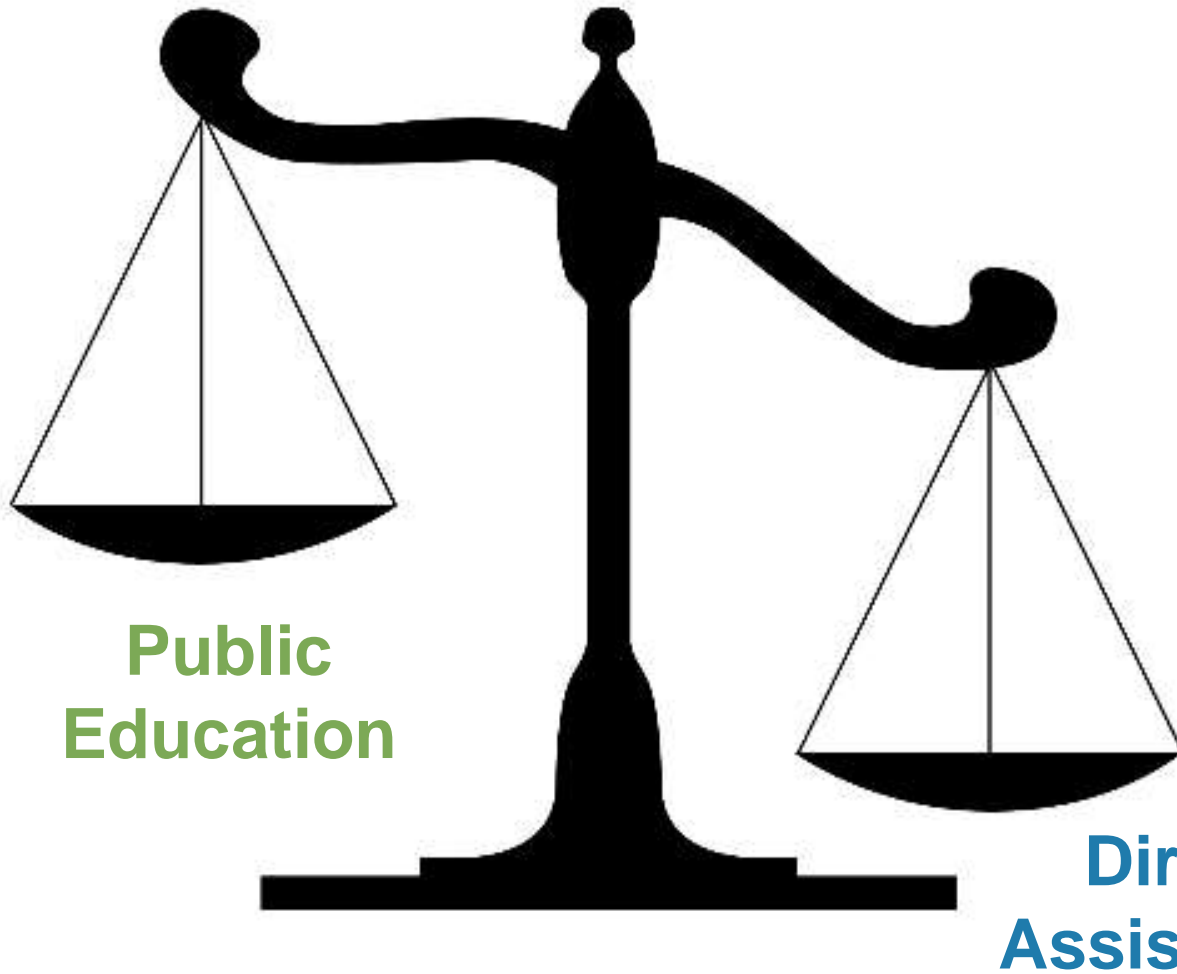
Provide **referrals** to health insurance consumer assistance or ombudsman, or any other appropriate state agencies, for any enrollee with a grievance, complaint, or question regarding their health plan

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



What Balance Makes Sense for You?



Assisters are Advocates!

Nonprofit

- Cannot endorse a specific candidate
- Limited in ability to promote specific legislation
- Focus on the issue

Federal funding

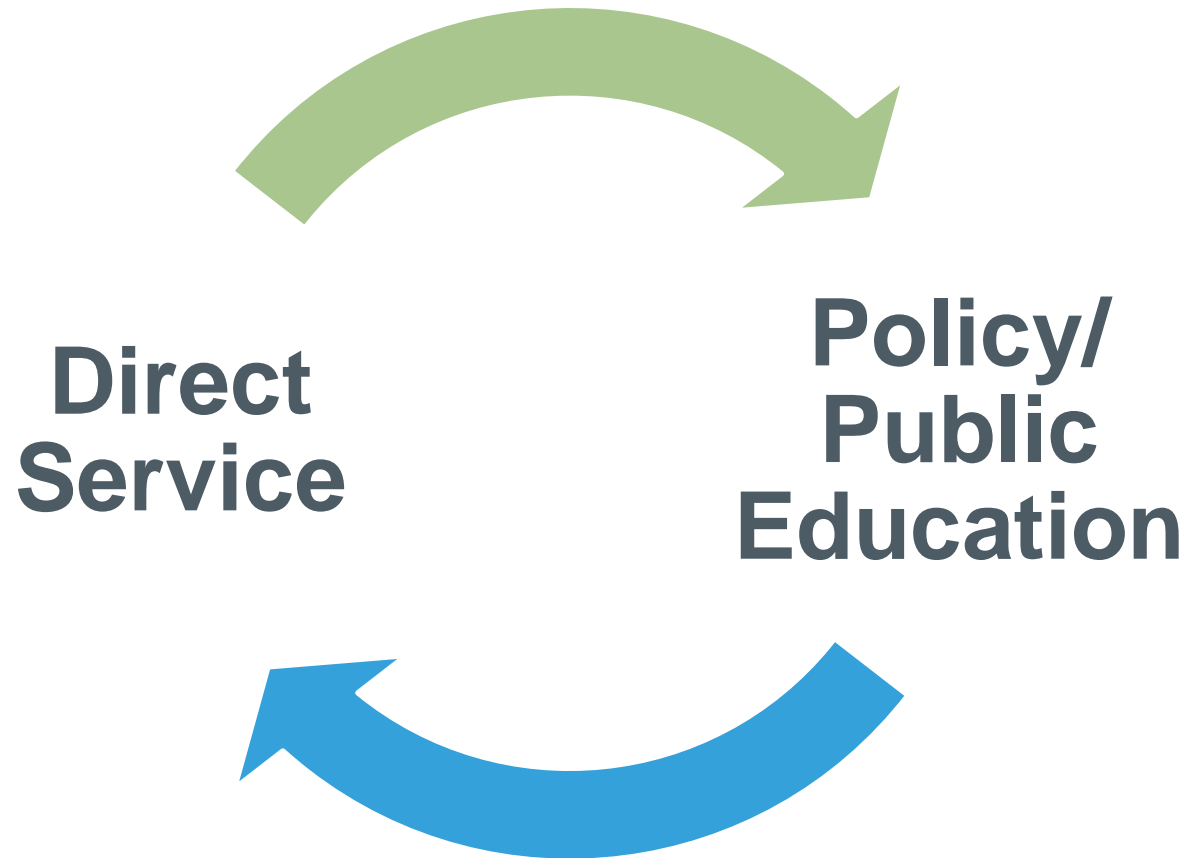
- Federal restrictions on lobbying
- Some advocacy falls within scope of grant duties

State regulations

- Many states have restrictions on assister activities



And: Not “Either/Or”



Together We Educate & Inform Policy



Legislative

Meetings on
the Hill

Testimony



Executive

Meetings
with
agencies

Commenting
on
Regulation

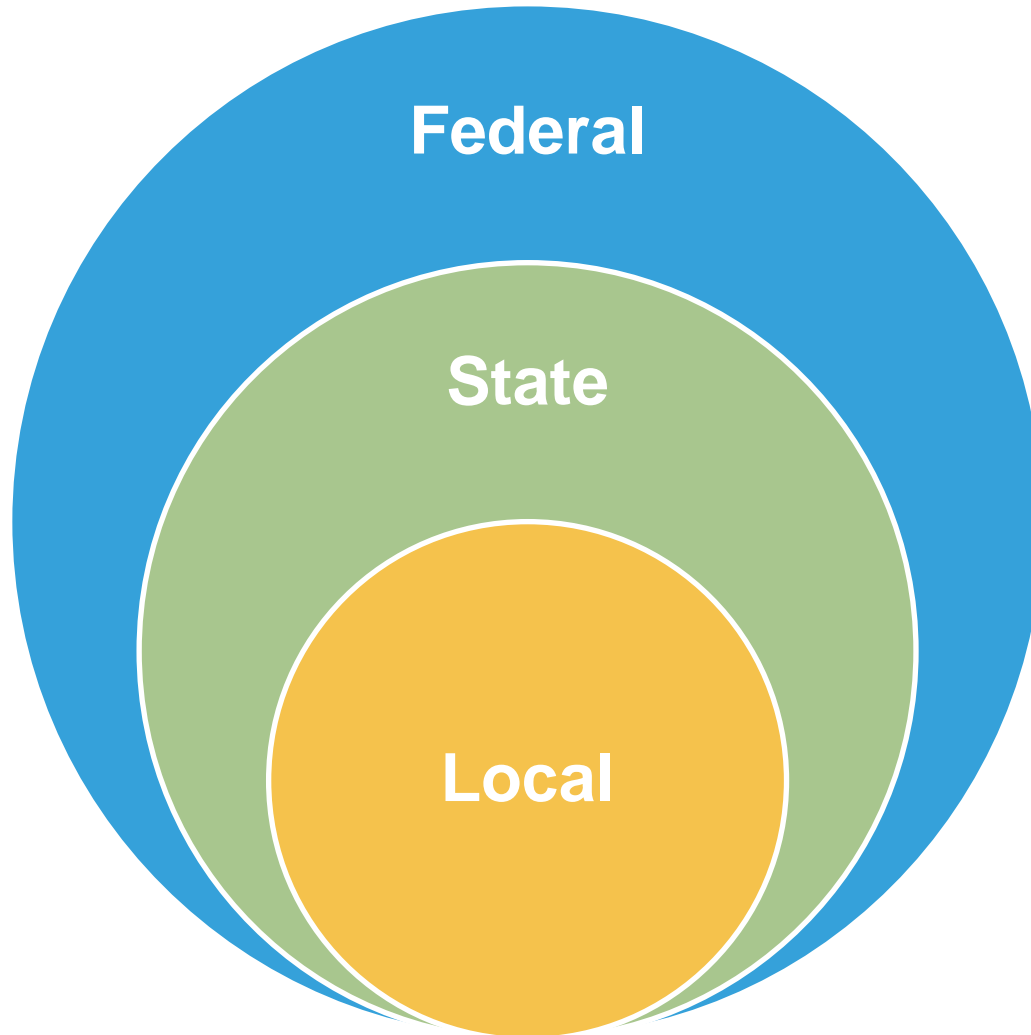


Judicial

Media

Public
Opinion

How Can You Engage?



Steps to Get There



**Identify
your
issue**



**Pinpoint
your
audience**



**Develop
your
message**



**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



Recent Example

HOME / BLOG

Blog Thursday, March 10, 2016

Changes to Special Enrollment Period Process Could Hurt Consumers

Share this:

Share

Tweet

Email



Elizabeth Hagan
Senior Policy Analyst



Kara Nester
Policy Analyst

At the end of February, the Centers for Medicare and Medicaid Services (CMS) announced a new process for consumers who enroll through the federal marketplace during special enrollment periods (SEPs). While the new process is not entirely laid out yet, we have seen that the changes will negatively affect low-income consumers and immigrants. In principle, the new process should protect consumers.

Special enrollment periods from gaps in health insurance

Consumers who experience a change in circumstances the year may enroll in marketplace health insurance because they give consumers an opportunity to change their insurance and an opportunity to change their circumstances.

SEPs are also a vital aspect of the marketplace, given that the market



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 require consumers to submit documentation for the most common special enrollment periods (SEPs), 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 through SEPs.

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



Department of Health and Human Services
465 Industrial Boulevard
London, Kentucky 40750-0001

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.

Family member(s)	Results	Next steps
Julia Smith	<ul style="list-style-type: none">• Can choose a health plan with lower copayments, coinsurance, and deductibles (OS)	<ul style="list-style-type: none">• Choose a health plan and make first month's payment

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



Advocacy Works!

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 more than half. Funding extension is essential so we don't move backwards from this progress."

"Bipartisan House leaders should be congratulated for coming together and moving forward. The health care of at least 8 million children hinges on this action."

"It is critically important for Congress to act swiftly. While funding for CHIP expires on September 30, governors and state legislatures need funding certainty to complete their own CHIP-related budget deliberations, which are already well advanced."

"Since its inception nearly two decades ago, CHIP has delivered needed health coverage to millions of children, and today's action is important progress in making sure that we would have preferred a four-year extension, the House bill has our full support."

The House overwhelmingly passed a clean, bipartisan extension of CHIP funding. Now it's time for the Senate to follow suit.

#ExtendCHIP



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?

Public Policy Toolkit



Federal Policy



State Policy



Reaching Out



Families USA produced the [Public Policy Toolkit for Enrollment Assistors](#) to give assisters an knowledge and tactics they need to be effective advocates.

Enrollment Assistors Can Be Strong Messengers

Making Your Voice Matter

HOW DOES A HEALTH CARE IDEA BECOME A LAW?

These are the steps that nearly every bill takes on its journey to the President's desk.



A policy maker gets an **idea** for legislation from his or her constituents or a group that represents a specific health care-related cause.



A bill is **introduced** by a member of Congress.



The bill is referred to key **committees**, which hold hearings.

KEY COMMITTEES

House Committee on Ways & Means
House Committee on Energy & Commerce
House Committee on Education & the Workforce

Senate Finance Committee
Senate Committee on Health, Education, Labor, & Pensions (HELP)



The bill is **debated** by the full House of Representatives or Senate.



The bill is **voted** on by the full House or Senate.



After the House and Senate both approve an identical bill, it is sent to the **President** for his or her signature or veto.

1,103
bills related to health care were introduced in the 113th Congress (2013-14)

22
of these bills became law

Sign up for the Network

❖ Weekly Newsletter

❖ Monthly Webinars

❖ Tools and Resources

Sign up at:

<http://familiesusa.org/initiatives/enrollment-assister-resource-center>

Enrollment Assister Network



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 assisters 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](#) 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](#) highlights how enrolling in marketplace coverage is an opportune time to also register people to vote.
- Kaiser Family Foundation released its [14th annual survey](#) 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](#). For the full series of population-specific fact sheets, click [here](#).
- Looking for zip code data on this enrollment period? A new [ASPE report](#) shares the number of Healthcare.gov plan selections in each zip code through January 9. Enroll America created a [map view](#) of the plan selection data to compare how geographical areas are performing this open enrollment period compared to last year's.

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:
<http://familiesusa.org/navigators-and-assisters-resource-center/enrollment-information.html>

Sign up for the Enrollment Assister Newsletter:
<http://fusa.convio.net/site/R?i=GXX2tYWoaJhUPhjrCctNow>



1201 New York Avenue, NW, Suite 1100
Washington, DC 20005

main 202-628-3030 / fax 202-347-2417

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

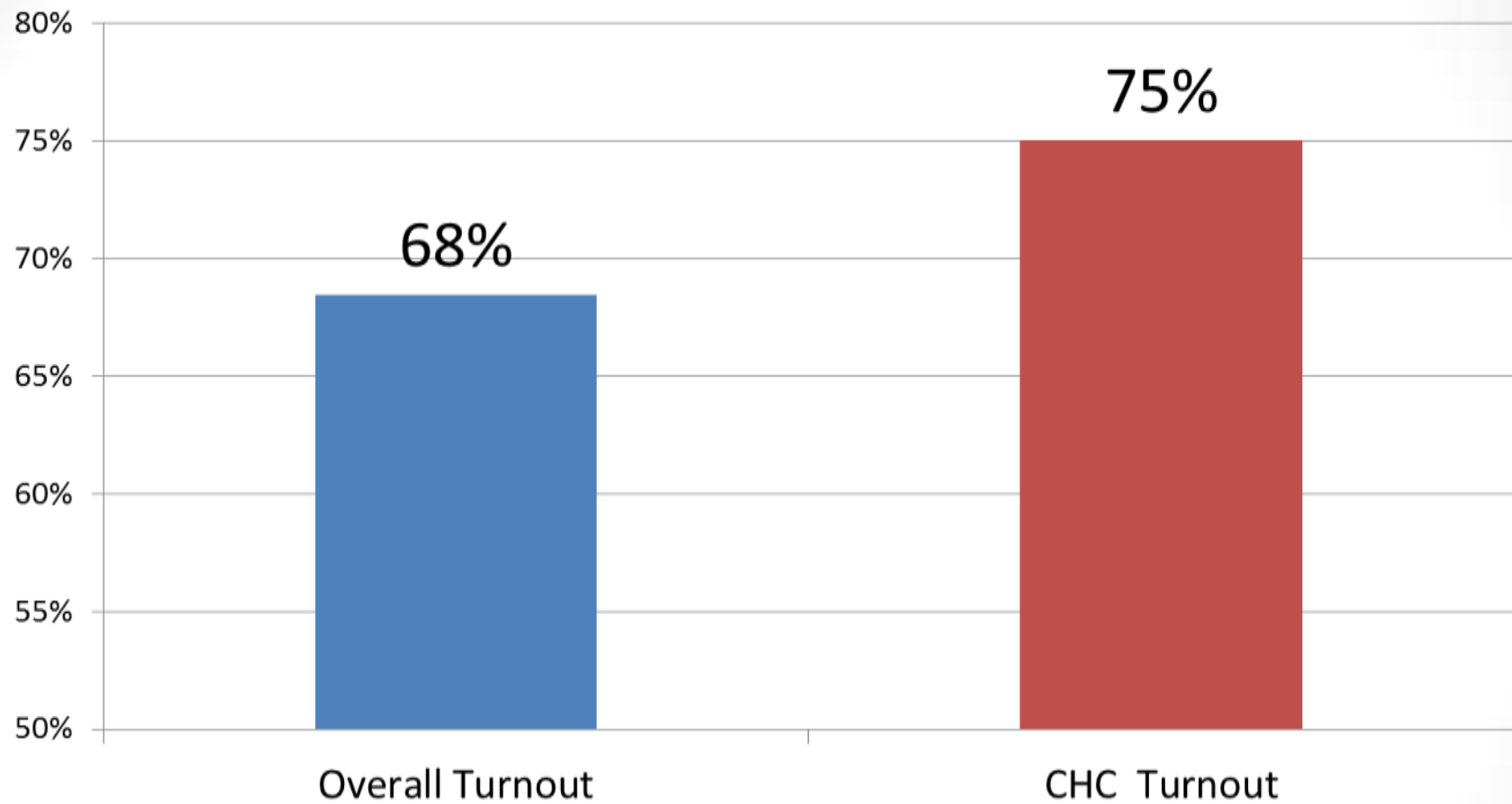
What type of political activities are nonprofit organizations and employees not allowed to engage in?

- 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.

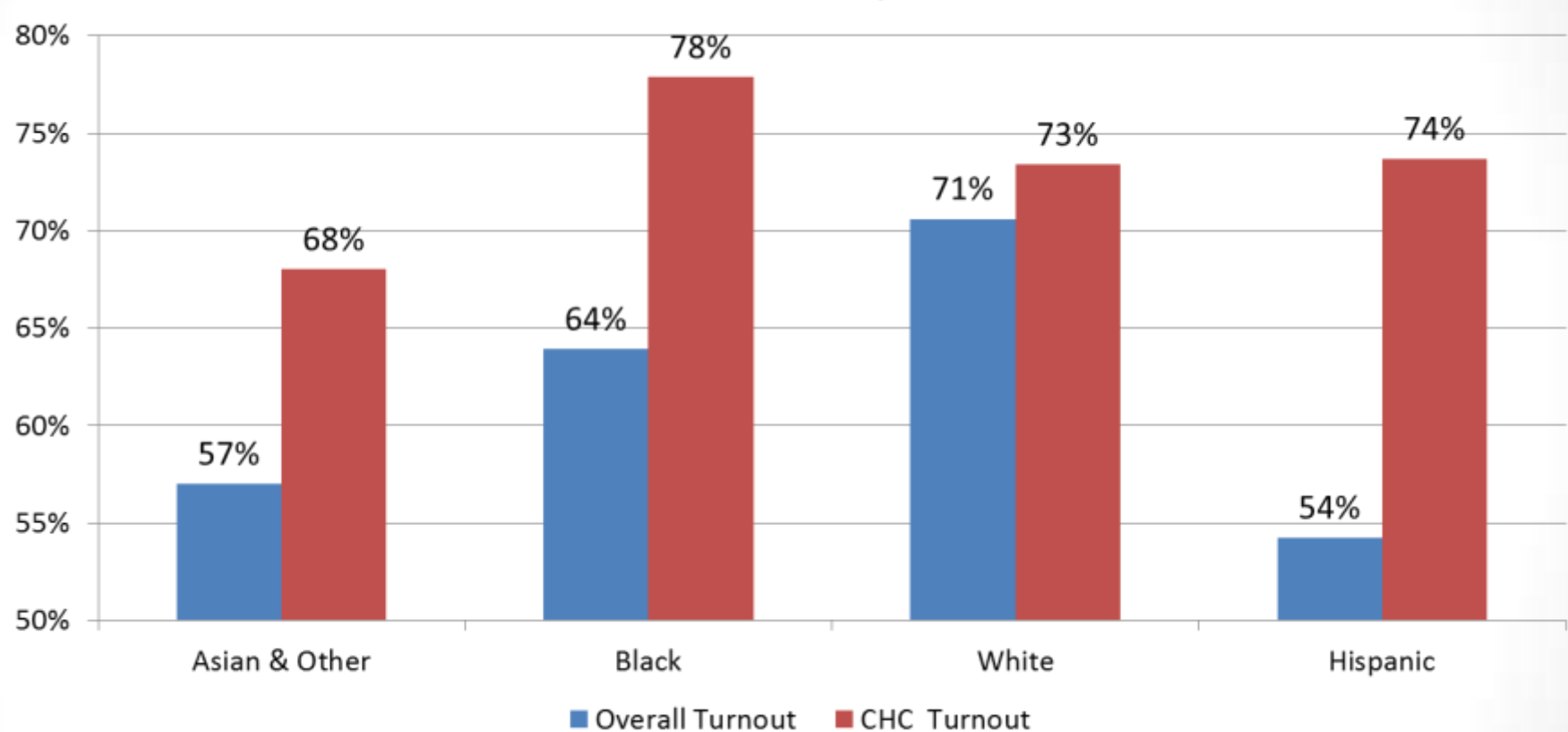
Voter Turnout in the 2012 Election



Source: Community Health Vote, 2012

2012 Elections

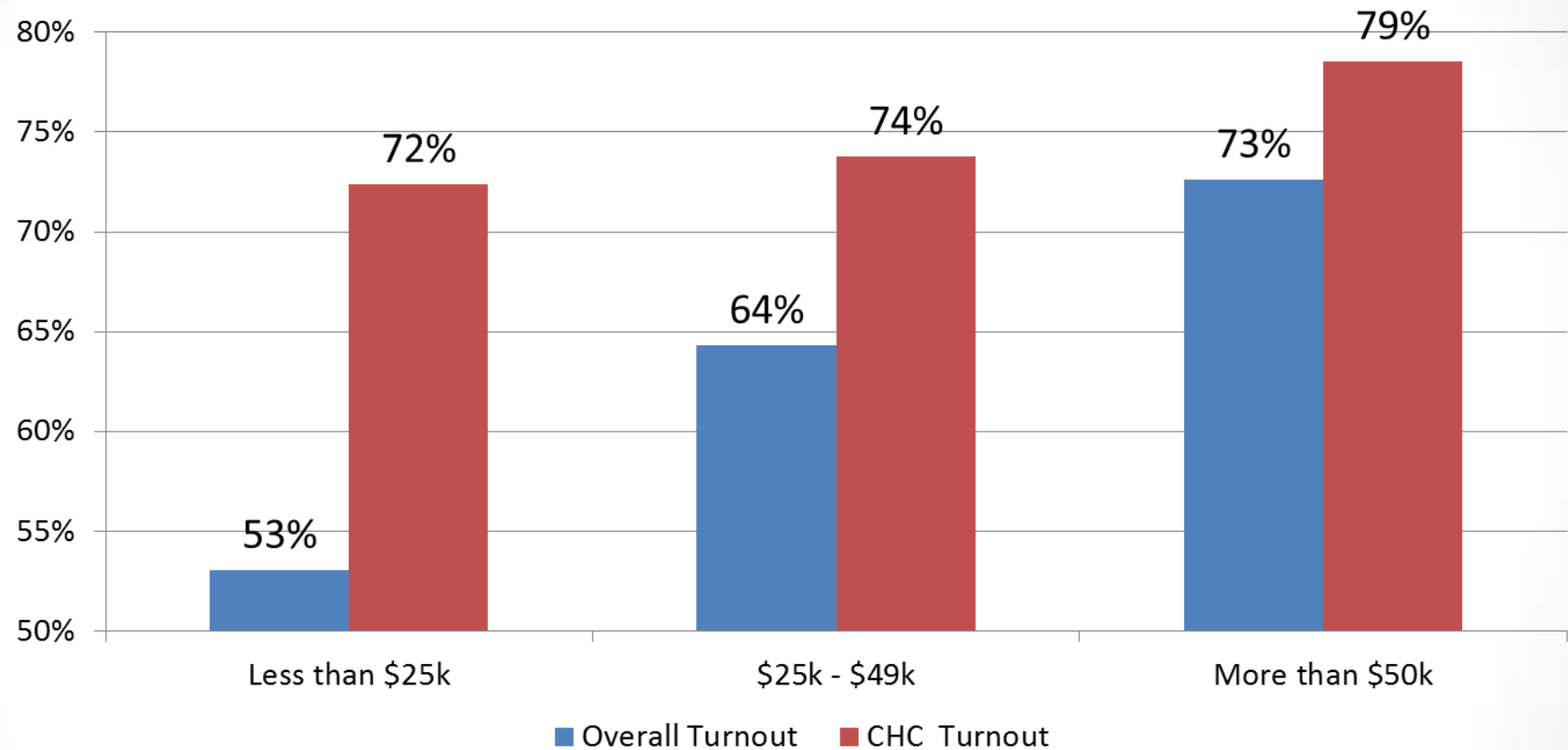
Voter Turnout by Race



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:
 - **Rock the Vote:** <http://www.rockthevote.com/get-informed/elections/voter-registration-deadlines.html>
 - **Community Health Vote State Materials:** <http://communityhealthvote.net/material/>
 - **Project Vote:** <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:

- CHAMPS Voter Resources and Ballot Measure Advocacy Webpage: <http://champsonline.org/tools-products/cross-disciplinary-resources/voter-reg-ballot-measure-advocacy>
- Community Health Vote: <http://communityhealthvote.net/>
- Nonprofit Vote: <http://www.nonprofitvote.org/>
- Project Vote: <http://projectvote.org/>
- Native Vote: <http://www.nativevote.org/>

Contact Information



Community
Health
Association of
Mountain/
Plains
States

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QUESTIONS?

Type any questions into the chat box at the bottom of the screen.