




Telephone Enrollment- Phase I Call Center Script

<p>GREETING & OPENING</p>	<p>“Hello, is (<u>First Name</u>) there?”</p> <p>“(Full Name)?”</p> <p>“Hi, Mr./Ms. (<u>Last Name</u>). This is (<u>Representative Name</u>) calling from California Health Care Options. I’m calling about your Medi-Cal benefits.”</p> <p>“Did you get the packet of information we sent you in the mail?” {continue whether beneficiary says yes or no}</p> <p>“We sent you a packet of information with a letter telling you that you had 30 days to choose a health plan or the state would choose a plan for you. Right now, you are past your 30-days.”</p> <p>“I’m calling to help you enroll in a health plan today, so you can choose what plan is best for you and your family instead of the State choosing one for you.</p> <p>If you don’t choose you might end up in a plan that you don’t want. If that happens, it will take at least 30 days to get out of that plan. We want to save you time and make sure you pick the plan that you’ll be happy with.”</p> <p>Picking a plan won’t take long. I’ll tell you the health plans in your county, and you tell me which one you want to enroll in. You won’t have to fill out any forms. So, let’s get started, okay?”</p> <p>{If beneficiary <u>agrees</u>, go to Verification}</p> <p>{If beneficiary <u>disagrees</u>, go to Beneficiary Acceptance- 2nd Attempt}</p>
<p>BENEFICIARY ACCEPTANCE- 2ND ATTEMPT</p>	<p><i>{Acknowledge beneficiary’s reason for not wanting the telephone enrollment. Counter beneficiary with the positive effects of a telephone enrollment}</i></p> <p>“The only way to be sure that you choose the health plan that you want is by enrolling over the phone today. If you don’t do it over the phone today, the State will choose a plan for you. Okay?”</p> <p>{If beneficiary <u>agrees</u>, go to Verification}</p> <p>{If beneficiary <u>disagrees</u>, go to No Enrollment- Conclusion}</p>

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<p>No ENROLLMENT- CONCLUSION</p>	<p>“If you want to talk to someone in person, you can go to see an Enrolment Service Representative at one of the local welfare offices. Do you want that information?”</p> <ul style="list-style-type: none"> a. {If yes} “Ok, our Enrolment Service Representatives are at a few places in your area. They are at <i>[Give site locations]</i> Which one do you want to go to? <i>[Give site details]</i> They will help you fill out the choice form. Please go as soon as possible so you can get your choice form in right away. Thank you for your time.” [End call] b. {If no} “If you have the choice form that came in your packet, please fill it in and mail it right away. You will get a letter from us telling what plan the state chose for you. Thank you for your time.” [End call]
<p>VERIFICATION</p>	<p>“Great! This won’t take long. Before we get started, I need to verify some information with you.</p> <p>“First, I want to let you know that this call is being recorded so we have a record of your choice of health plans.</p> <p>“Please tell me your mailing address. <i>[Verify correct address]</i></p> <p>“Please tell me your date of birth. <i>[Verify correct D.O.B.]</i> Thank you.“</p> <p>{Go to Plan Choice}</p>

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<p>PLAN CHOICE</p>	<p>“Do you already know what health plan you want to choose?”</p> <ul style="list-style-type: none"> a. {If yes, verify plan is available. Enroll in plan} b. {If no} “There are (#) available health plans in your county. The plans are (<u>available plans</u>). Which one do you want to enroll in?” <i>[Enroll in plan]</i> <p>{If there are <u>no family members that need to enroll</u>,  and go to Enrollment- Conclusion}</p> <p>“There are also (#) members of your family who need a health plan. I’m going to read their names and ask you to verify each person’s date of birth. Then tell me which health plan you want that person enrolled in. Your family members don’t have to be in the same plan you’re in.</p> <p>“[Read family member’s name]. What’s (<u>first name</u>)’s date of birth? <i>[Verify correct D.O.B]</i></p> <p>“Which plan do you want to enroll (<u>first name</u>) in?” <i>[Enroll in plan]</i> <i>[Repeat for each family member that needs to be enrolled in a plan]</i></p> <p>{If beneficiary is <u>not in Sacramento county</u>,  and go to Enrollment- Conclusion}</p> <p>{If beneficiary <u>is in Sacramento County</u>, go to Sacramento Dental Enrollment}</p>
<p>SACRAMENTO DENTAL ENROLLMENT</p>	<p>“Now you need to choose a dental plan so you can go to the dentist. There are four dental plans to choose from. They are: Access Dental, Community Dental, Liberty Dental, and Western Dental. Which dental plan do you want to enroll in?” <i>[Enroll in dental plan.]</i></p> <p>{If there are <u>no family members that need to enroll in a dental plan</u>,  and go to Enrollment- Conclusion}</p> <p>“Your family members need dental plans too. “Which plan do you want to enroll (<u>first name</u>) in?” <i>[Enroll in plan]</i> <i>[Repeat for each family member that needs to be enrolled in a plan]</i></p> <p>{Go to Enrollment- Conclusion}</p>

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ENROLLMENT-
CONCLUSION

“Congratulations, we’re all done! To confirm, I enrolled you in (health plan beneficiary chose).

- a. **{If plan chosen for family members}**
“I enrolled (family member) in (chosen health plan).” *[Repeat for each family member]*
- b. **{If dental plan chosen}** “I also enrolled you in (dental plan beneficiary chose).” *[Repeat for each family member]*

If you still have your paper Choice Form, don’t mail it in because we are done. Do you have any questions?” *[address any questions asked]*

“Your plan choice will start in 15 to 45 days. We’ll send you a letter that shows which plan(s) you chose. Your new health plan will also send you some information, and they’ll tell you when you can start using the plan. Until then, if you need to see a doctor, go to the Medi-Cal doctors you go to now. If you have any other questions, please call our #800 at 1-800-430-4263. Thank you for time.” **[End call]**

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CALL BACKS

Only initiate a call back if you genuinely believe that it will result in a phone enrollment. If a beneficiary gives you reason to believe that they will make a phone enrollment choice after they obtain further information (i.e. what plan current doctor affiliates with or 'ok' from spouse), proceed as follows:

"If I give you time to _____, and then call you again on (next business day) will you choose a health plan over the phone at that time?"

- a. **{If yes}** "What time should I call? What number can I reach you at? [update # in MAXSTAR] I'll give you a call (next business day) at _____. Please make sure you are there. I want to make sure you can get into the plan of your choice, and that the State doesn't choose a plan for you. Thank you." **[End call]**
- b. **{If no}** "I just want to make it clear to you that if you don't enroll in a health plan immediately, the State will choose a plan for you. The plan that they put you in may not be right for you or your family. Do you think you'll be ready to choose a health plan over the phone tomorrow?"
 - b.1. **{If yes, return to a.}**
 - b.2. **{If no, go to No Enrollment-Conclusion}**

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**BENEFICIARY
FREQUENTLY
ASKED
QUESTIONS
(FAQs)****Why do I have to enroll in a (health/dental/managed care) plan?**

“The State has decided that some people who get Medi-Cal must get their services through a managed care plan.

Actually once you enroll in a managed care plan it should be easier for you and your family to find a doctor who takes Medi-Cal. Managed care should make it easier to get regular check-ups and get the care that you need in order to keep you and your family healthy.”

Is my doctor affiliated with any of those plans? or Which plan does my doctor accept?

“I do not have that information. You need to call your doctor’s office and ask if the doctor works with any plans.” {Go to **Call Backs**}

Why don’t you just pick a plan for me?

“This is a decision that needs to be made by you. You know the most about your health, your family’s health and what works best for you. If you pick a plan and are not happy with the plan, for whatever reason, you can always change to another plan.”

Can I call you back later and enroll?

“Our call center is not taking enrollments over the phone at this time. The only way to enroll over the phone is to do it now.”

{If beneficiary cannot enroll now, go to **Call Backs**}