

Customer Service Standards and Community Outreach



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Course Introduction

Welcome

The screenshot shows a digital course interface. At the top, there is a dark blue header with 'Course Introduction' on the left, 'Text Version' with a toggle switch in the middle, and 'Exit Course' on the right. Below this is a blue bar with the word 'Welcome'. The main content area is white. On the left, a man in an orange shirt and brown pants stands with a speech bubble that says: 'Welcome to the Customer Service Standards and Community Outreach course! I am Romain, and I will help guide you through this course so you can answer these questions.' To the right is a whiteboard with a grey border. The whiteboard has the heading 'Can you answer these questions?' in a cursive font, followed by three questions: 'How should I handle an emotional consumer?', 'What can I do to help a consumer with a cognitive impairment?', and 'What is my role in community outreach?'. At the bottom, a dark blue navigation bar contains icons and labels for 'Menu', 'Help', 'Glossary', 'Resources', 'Map', 'Module 1 of 3', 'Page 1 of 4', and navigation arrows.

Welcome to the Customer Service Standards and Community Outreach course! I am Romain, and I will help guide you through this course so you can answer these questions.

- How should I handle an emotional consumer?
- What can I do to help a consumer with a cognitive impairment?
- What is my role in community outreach?

Disclaimers

The screenshot shows a training course interface. At the top, there is a navigation bar with 'Course Introduction' on the left, 'Text Version' with a toggle switch in the middle, and 'Exit Course' on the right. Below this is a blue header with the word 'Disclaimers'. The main content area features a man in a red shirt and tan pants on the left, looking thoughtful. A speech bubble next to him says: 'Before we begin, you need to be aware of these training disclaimers. Select "Continue" on the tablet to read each of these disclaimers.' To the right is a large tablet held by a hand. The tablet screen displays the following text: 'The Patient Protection and Affordable Care Act and associated regulations refer to Health Insurance Marketplaces as American Health Benefit Exchanges, Health Insurance Exchanges, or Exchanges. Throughout this training, you'll see the term Marketplace used interchangeably with Exchange.' At the bottom of the tablet screen are two buttons: 'Previous' and 'Continue'. Below the tablet is a dark navigation bar with icons for 'Menu', 'Help', 'Glossary', 'Resources', and 'Map'. It also shows 'Module 1 of 3', a back arrow, 'Page 2 of 4', and a forward arrow.

Before we begin, you need to be aware of these training disclaimers.

The Patient Protection and Affordable Care Act and associated regulations refer to Health Insurance Marketplaces as American Health Benefit Exchanges, Health Insurance Exchanges, or Exchanges. Throughout this training, you'll see the term Marketplace used interchangeably with Exchange.

Assister Training Content:

The information provided in this training course is not intended to take the place of the statutes, regulations, and formal policy guidance that it is based upon. This course summarizes current policy and operations as of the date it was uploaded to the Marketplace Learning Management System. Links to certain source documents have been provided for your reference. We encourage persons taking the course to refer to the applicable statutes, regulations, CMS assister webinars, and other interpretive materials for complete and current information.

This course includes references and links to nongovernmental third-party websites. CMS offers these links for informational purposes only, and inclusion of these websites should not be construed as an endorsement of any third-party organization's programs or activities.

Coronavirus (COVID-19):

This training does not address COVID-19-related guidance or related requirements for assisters. CMS will communicate applicable information to assisters and assister organizations through separate channels.

- To learn more about how we're responding to coronavirus, visit [HealthCare.gov/blog/coronavirus-marketplace-coverage/](https://www.healthcare.gov/blog/coronavirus-marketplace-coverage/).
- For preventive practices and applicable state/local guidance, visit [CDC.gov/coronavirus](https://www.cdc.gov/coronavirus).

Individual Shared Responsibility Payment, Exemptions, and Catastrophic Coverage:

This course includes numerous references to the Patient Protection and Affordable Care Act's individual shared responsibility provision and exemptions from it. Under the Tax Cuts and Jobs Act, taxpayers must continue to report minimum essential coverage, qualify for an exemption, or pay an individual shared responsibility payment for tax years prior to 2019.

For tax year 2018 only (for which consumers generally filed taxes by April 2019), consumers do not have to fill out an application to get a hardship exemption certificate number (ECN). Consumers can claim the exemption without having to submit documentation about the hardship on their 2018 federal tax returns.

Beginning with tax year 2019, consumers do not need to make an individual shared responsibility payment or file Form 8965, Health Coverage Exemptions, with their tax returns if they don't have minimum essential coverage for part or all of the tax year.

For all tax years, as set forth in §155.305(h), individuals age 30 and above must continue to apply for, obtain, and report an exemption certificate number (ECN) for a Marketplace affordability or hardship exemption if they wish to purchase Catastrophic health coverage.

Standards Related to Essential Health Benefits:

Navigators in FFM(s) must be prepared to inform consumers of the essential health benefits (EHB) that qualified health plans (QHPs) must cover in the FFM(s) they service. For plan years beginning on or after January 1, 2020, states may select which benefits will be EHB in their state by:

1. Choosing from the 50 EHB-benchmark plans that other states used for the 2017 plan year;
2. Replacing one or more EHB categories of benefits under its EHB-benchmark plan used for the 2017 plan year with the same categories of benefits from another state's EHB-benchmark plan used for the 2017 plan year; or
3. Selecting a set of benefits to become its EHB-benchmark plan, provided that the new EHB-benchmark plan meets certain requirements.

When selecting an updated EHB-benchmark plan from the available options, the generosity of the state's updated EHB-benchmark plan may not exceed a 0.0 percentage point actuarial increase above the most generous among the set of comparison plans.

Remote Application Assistance:

Effective June 18, 2018, Navigators in FFM(s) are not required to maintain a physical presence in their Marketplace service area. In some cases, Navigators may provide remote application assistance (e.g., online or by phone), provided that such assistance is permissible under their organization's contract, grant terms and conditions, or agreement with CMS and/or their organization.

Certified application counselors in FFM(s) may also provide remote application assistance if such assistance is permissible with their certified application counselor designated organization (CDO).

For guidance on obtaining consumers' consent remotely over the phone, visit: [Marketplace.cms.gov/technical-assistance-resources/obtain-consumer-authorization.pdf](https://www.cms.gov/technical-assistance-resources/obtain-consumer-authorization.pdf).

FFM Navigator Duties:

Beginning with Navigator grants awarded in 2019, FFM Navigators may but are no longer required to provide information on or assist consumers with the following topics:

1. Understanding the process of filing Marketplace eligibility appeals;
2. Understanding and applying for exemptions from the individual shared responsibility provision granted through the Marketplace and/or claimed through the tax filing process;
3. Marketplace-related components of the premium tax credit reconciliation process;
4. Understanding basic concepts and rights related to health coverage and how to use it; and
5. Referrals to licensed tax advisers, tax preparers, or other resources for assistance with tax preparation and tax advice related to consumer questions about the Marketplace application and enrollment process, exemptions from the requirement to maintain minimum essential coverage and from the individual shared responsibility payment (for tax years prior to 2019), and premium tax credit reconciliations.

CMS will continue to provide all assisters with additional information related to these assistance activities through webinars, job aids, and other technical assistance resources.

Definitions

Course Introduction Text Version Exit Course

Definitions

In this lesson, the terms "you" and "assister" refer to the following types of assisters:
Select each nametag.



HealthCare.gov
Navigators
in Federally-facilitated Marketplaces



HealthCare.gov
Certified application counselors
in Federally-facilitated Marketplaces

Note: The terms "Federally-facilitated Marketplace" and "FFM," as used in these training courses, include FFMs where the state performs plan management functions.
Generally, unless otherwise indicated, the term "Marketplace" is used in this course to refer to the individual market FFMs.

Menu Help Glossary Resources Map Module 1 of 3 Page 3 of 4

In this lesson, the terms "you" and "assister" refer to the following types of assisters:

Navigators in Federally-facilitated Marketplaces

Certified application counselors in Federally-facilitated Marketplaces

Note: The terms "Federally-facilitated Marketplace" and "FFM," as used in these training courses, include FFMs where the state performs plan management functions.

Generally, unless otherwise indicated, the term "Marketplace" is used in this course to refer to the individual market FFMs.

Course Goal

Course Introduction Text Version ON Exit Course

Course Goal

Regardless of your role or level of experience, customer service is an essential part of your job. You can use the strategies and best practices we'll cover in this course to share information with consumers about the FFMs, answer their health coverage questions, and help consumers select a health plan.



Goal:
This course covers key skills and best practices for successfully interacting with consumers and conducting effective community outreach—especially for hard-to-reach populations.



Topics:
This course includes information on:

- Strategies for assisting consumers with difficult situations.
- Providing good customer service to consumers with cognitive impairments or intellectual disabilities.
- Working with consumers with limited English proficiency (LEP).
- Setting goals for community outreach.
- Building a strategy for community outreach.

Menu Help Glossary Resources Map Module 1 of 3 Page 4 of 4

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Topics

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- Setting goals for community outreach.
- Building a strategy for community outreach.

Customer Service Basics

Introduction

Customer Service Basics Text Version Exit Course

Introduction

You play an important role in making sure consumers get respectful, appropriate, culturally competent, and courteous assistance when they're looking for coverage through an FFM.

- 01 Customer Service Strategies**
Describe strategies to provide friendly, objective, and unbiased customer service in difficult situations with consumers
- 02 Cognitive Impairment/ Intellectual Disability**
Identify effective ways to work with consumers with a cognitive impairment or an intellectual disability
- 03 Limited English Proficiency**
State resources that are available for working with consumers with limited English proficiency (LEP)

Menu Help Glossary Resources Map Module 2 of 3 Page 1 of 14

You play an important role in making sure consumers get respectful, appropriate, culturally competent, and courteous assistance when they're looking for coverage through an FFM.

Customer Service Strategies

Describe strategies to provide friendly, objective, and unbiased customer service in difficult situations with consumers

Cognitive Impairment/ Intellectual Disability

Identify effective ways to work with consumers with a cognitive impairment or an intellectual disability

Limited English Proficiency

State resources that are available for working with consumers with limited English proficiency (LEP)

Dealing With Complicated Situations

Customer Service Basics Text Version Exit Course

Dealing With Complicated Situations

The majority of consumers you serve will be grateful for your help. Some consumers may be frustrated with the process by the time they reach you. They may have faced other challenges that affect the way they interact with you. You should be able to identify consumers' emotions or circumstances to provide appropriate support. Try not to take what consumers say personally, and ask for a supervisor's or colleague's help when needed.

Some challenging situations you might face include consumers who just want to discuss unrelated topics or consumers who have:

- Emotional responses
- Complaints about health reform
- Cognitive impairments or intellectual disabilities
- Limited English proficiency (LEP)



Menu Help Glossary Resources Map Module 2 of 3 Page 2 of 14

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- Emotional responses
- Complaints about health reform
- Cognitive impairments or intellectual disabilities
- Limited English proficiency (LEP)

Dealing With Complicated Situations

Customer Service Basics Text Version Exit Course

Dealing With Complicated Situations

Sometimes you may need to provide referrals for consumers with grievances, complaints, or questions regarding health plans that fall outside the scope of your assister duties. Depending on the type of the complaint or question, you can help consumers contact:

- Your state's Department of Insurance (or another state agency)
- Your state's Medicaid office
- The Centers for Medicare & Medicaid Services (CMS)

You should also advise consumers that they can file a complaint directly with their health insurance company.

You will learn more about appropriate consumer referrals in the *Assister Standard Operating Procedures* course.

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- Your state's Department of Insurance (or another state agency)
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You should also advise consumers that they can file a complaint directly with their health insurance company.

You will learn more about appropriate consumer referrals in the *Assister Standard Operating Procedures* course.

Knowledge Check

Customer Service Basics Text Version Exit Course

Knowledge Check



You will serve consumers from a wide variety of backgrounds. What are ways you can provide friendly and impartial customer service?

Choose **all that apply** and then select **Check Your Answer**.

- A. Be aware of consumers' emotions and specific circumstances.
- B. Try not to take what some consumers may say personally.
- C. Avoid asking your supervisor for help.
- D. Ask your supervisor for help if needed.

 **Check Your Answer**

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You will serve consumers from a wide variety of backgrounds. What are ways you can provide friendly and impartial customer service?

- A. Be aware of consumers' emotions and specific circumstances.
- B. Try not to take what some consumers may say personally.
- C. Avoid asking your supervisor for help.
- D. Ask your supervisor for help if needed.

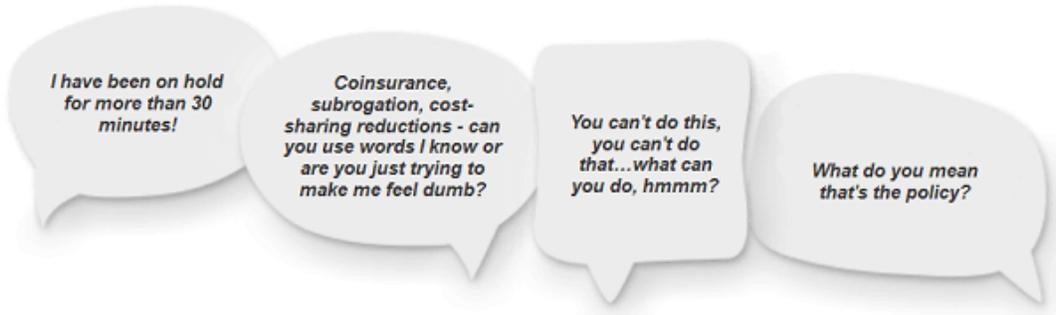
The correct answers are A, B, and D. You should be aware of consumers' emotions and specific circumstances, not take what consumers say personally, and ask your supervisor for help if needed.

Emotional Consumers

Customer Service Basics Text Version Exit Course

Emotional Consumers

You may have to deal with consumers who are emotional. They may be angry, sad, hopeless, or fearful. You should always be patient and get help from your colleagues or your supervisor as needed.



I have been on hold for more than 30 minutes!

Coinsurance, subrogation, cost-sharing reductions - can you use words I know or are you just trying to make me feel dumb?

You can't do this, you can't do that...what can you do, hmmm?

What do you mean that's the policy?

What best practices can you follow when you are dealing with unhappy consumers?

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You may have to deal with consumers who are emotional. They may be angry, sad, hopeless, or fearful. You should always be patient and get help from your colleagues or your supervisor as needed.

- I have been on hold for more than 30 minutes!
- What do you mean that's the policy?
- You can't do this, you can't do that...what can you do, hmmm?
- Coinsurance, subrogation, cost-sharing reductions — can you use words I know or are you just trying to make me feel dumb?

What best practices can you follow when you are dealing with unhappy consumers?

Best Practices

Customer Service Basics Text Version Exit Course

Best Practices

Select each term below to learn more about best practices for dealing with consumers in these difficult situations.

- Maintain Professionalism**
- Defuse Anger**
- Acknowledge Feelings**
- Keep Emotions in Check**
- Listen to Consumers' Opinions**

Maintain Professionalism

You should not comment on whether a process or the law is fair. If consumers ask for your opinion about an eligibility determination or about Patient Protection and Affordable Care Act (PPACA) regulations, explain the determination or regulations to the consumer in an objective manner.

Here are some more tips for maintaining professionalism:

- Focus your responses on what you can do rather than on what you can't do.
- Listen attentively to consumers.
- Show empathy and let consumers know that you share their goals.
- Acknowledge but don't agree with or encourage consumers' emotions.
- Focus on facts and avoid sharing your opinions.
- Don't argue but instead try to see the situation from consumers' perspectives and remember that you both share the same goal of finding positive outcomes.
- Remember to maintain professional distance. You are there to assist them, not to sway them one way or another.

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Here are some additional best practices for dealing with consumers in these difficult situations.

Maintain Professionalism

You should not comment on whether a process or the law is fair. If consumers ask for your opinion about an eligibility determination or about Patient Protection and Affordable Care Act (PPACA) regulations, explain the determination or regulations to the consumer in an objective manner.

Here are some more tips for maintaining professionalism:

- Focus your responses on what you can do rather than on what you can't do.
- Listen attentively to consumers.
- Show empathy and let consumers know that you share their goals.
- Acknowledge but don't agree with or encourage consumers' emotions.
- Focus on facts and avoid sharing your opinions.
- Don't argue but instead try to see the situation from consumers' perspectives and remember that you both share the same goal of finding positive outcomes.
- Remember to maintain professional distance. You are there to assist them, not to sway them one way or another.

Defuse Anger

- Allow consumers to say what they're feeling. If consumers get off topic, try to bring the discussion back to the topic at hand.
- Tell verbally abusive consumers, in a calm way, that you'd like to work together to resolve any issues. You might also recommend taking a short break to calm down before resuming your discussion.
- Show agitated consumers that they're being heard. Abruptly cutting off consumers will often add fuel to the fire. When consumers start the conversation in an agitated manner while relating an experience, it may be best to allow them to vent.

- Follow established procedures for reporting immediate harm or danger when consumers are particularly difficult or may become violent.

Acknowledge Feelings

When you feel like you are being heard and someone acknowledges your feelings, you are often able to stop arguing. Apply this approach and you will likely put an end to the combative dialogue. You don't have to agree with consumers; just calmly acknowledge their feelings and frustrations.

Here are some simple statements that will often help turn the conversation around:

- I hear how upset you are.
- I hear how frustrating this has been and I want to help.
- I'm sorry this has happened to you.
- I regret the inconvenience this has caused you.

Assure consumers that you are here because you want to help. Again, you do not need to agree with what consumers say; just acknowledge consumers' emotions.

Keep Emotions in Check

- Do not respond defensively or show hostility towards emotional consumers.
- Take a deep breath and look for ways to remain helpful if you feel yourself getting upset with the situation.
- Keep a calm tone of voice and slow your rate of speech to help de-escalate the situation.
- Focus on resolving issues and objectively explaining regulations.

Listen to Consumers' Opinions

There may be times when consumers will share opinions, either positive or negative, about the PPACA.

- Let consumers know that you'll do your best to help resolve their concerns. Don't agree with or get into a discussion of complaints about health care reform; try to talk about health coverage options.
- Try to clear up any misconceptions by providing accurate, up-to-date information and keeping the conversation fact based.
- Be aware of body language and facial expressions to avoid giving the wrong message.

Biased or Neutral?

Customer Service Basics Text Version Exit Course

Biased or Neutral?

Remaining neutral and unbiased is an important skill for assisters.

This is a neutral statement. *Let's collect your information to see what coverage options are available for your family.*

This is a biased statement. *I agree. It's a pain that the government is making everyone get health insurance.*

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Remaining neutral and unbiased is an important skill for assisters.

This is a neutral statement.

Let's collect your information to see what coverage options are available for your family.

This is a biased statement.

I agree. It's a pain that the government is making everyone get health insurance.

FFM Application: Income

Customer Service Basics Text Version Exit Course

FFM Application: Income

On the next few screens will be several statements that consumers might say.

1. Read each statement, changing the inflection on some of the words in the statement. For example, "This new 'act' is going to cost my company a **fortune**" and "This new 'act' is going to cost **my company** a fortune."
2. Think about a biased response to each statement, and then think about the best neutral response to the statement.

Select **Next Statement** and compare your statements with our examples.

| Response | |
|---|--|
| Biased | Neutral |
| <i>It's not cheap. You're right about that.</i> | <i>Let's look at the Small Business Health Care Tax Credit Estimator to see if you might be eligible for a tax credit. We can also look at a few different plans. You can decide how much of the premium cost you want to cover and how much your employees should contribute.</i> |

[Next Statement](#)

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Here are several statements that consumers might say.

1. Read each statement, changing the inflection on some of the words in the statement. For example, "This new 'act' is going to cost my company a fortune" and "This new 'act' is going to cost my company a fortune."
2. Think about a biased response to each statement, and then think about the best neutral response to the statement.

Statement 1:

This new "act" is going to cost my company a fortune. Affordable? Yeah, right!

Biased

It's not cheap. You're right about that.

Neutral

Let's look at the Small Business Health Care Tax Credit Estimator to see if you might be eligible for a tax credit. We can also look at a few different plans. You can decide how much of the premium cost you want to cover and how much your employees should contribute.

Statement 2:

As soon as my state passed a law to lift the ban on gay marriage, my partner and I tied the knot. I want to know if we can get coverage.

Biased

I will get someone else to help you because I don't approve of your lifestyle.

Neutral

Let's take a look at the eligibility determination process to find out which programs each of you would be eligible for.

Statement 3:

I need a Spanish translator to help me. My English is not good.

Biased

This is America. You really should learn to speak English.

Neutral

We can arrange for a Spanish-speaking customer service representative to assist with translation throughout the process at no cost to you.

Statement 4:

I am a healthy person. I've never needed health care and I don't need it now.

Biased

Unfortunately, being healthy has nothing to do with needing health care.

Neutral

The Patient Protection and Affordable Care Act was created to provide people with options to purchase different health plans for coverage based on their needs. We can find an affordable plan that works for your healthy lifestyle.

FFM Application: Income

Customer Service Basics Text Version Off Exit Course

FFM Application: Income (cont'd)

On the previous screens, you were presented with examples of consumer statements that might lead assisters to respond in a biased manner. We will now cover statements that consumers might say, incorrect responses that you should avoid, and better responses that you can use to more effectively help them.

Select **Next Statement** and compare your statements with our examples.

Explanation:
In some instances, this statement is a way for consumers to leave without applying for coverage. Sometimes, however, this statement is true. The best way to respond to these consumers is to suggest a meeting to ensure that everyone has an opportunity to ask questions and get a better understanding of what is available. A meeting ensures that everyone feels comfortable with making a decision and moving forward.



I need to talk to my spouse before I make any decisions.

Response

| One Way to Respond | A Better Way to Respond |
|---|--|
| <i>No, I think you should enroll today.</i> | <i>I think that is a great idea. Why don't we get your spouse on the phone so that I can answer any questions they may have as well?</i> |

NEXT STATEMENT

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On the previous screens, you were presented with examples of consumer statements that might lead assisters to respond in a biased manner.

We will now cover statements that consumers might say, incorrect responses that you should avoid, and better responses that you can use to more effectively help them.

Statement 1:

I need to talk to my spouse before I make any decisions.

Wrong Way to Respond

No, I think you should enroll today.

A Better Way to Respond

I think that is a great idea. Why don't we get your spouse on the phone so that I can answer any questions they may have as well?

Explanation: In some instances, this statement is a way for consumers to leave without applying for coverage. Sometimes, however, this statement is true. The best way to respond to these consumers is to suggest a meeting to ensure that everyone has an opportunity to ask questions and get a better understanding of what is available. A meeting ensures that everyone feels comfortable with making a decision and moving forward.

Statement 2:

I just wanted to get the information today. I'll enroll later.

Wrong Way to Respond

You need to enroll right now.

A Better Way to Respond

Now that you have the information, what do you think about your options? What do you feel will work best for your family?

Explanation: Sometimes consumers want answers to their questions but still don't feel comfortable making a decision. Use open-ended questions to keep consumers engaged and to find the true reasons for their hesitation.

Statement 3:

We don't need health insurance; we will probably never use it.

Wrong Way to Respond

OK. It's great that you're healthy. Have a good day!

A Better Way to Respond

I truly do hope that you will never have to use your health insurance plan. However, you are currently required to maintain minimum essential coverage or obtain an exemption. Do you have questions about any of the plans we have looked at today?

Explanation: There will be some consumers who do not want to buy a health insurance plan. They don't believe that they will ever use it and they think that it's a waste of money. For this objection, remind consumers of the law. Remind them that they are required by law to maintain minimum essential coverage.

Consumers Who Just Want to Talk

Customer Service Basics Text Version Exit Course

Consumers Who Just Want to Talk

You may meet with consumers who want to talk about other issues or move your discussion off topic. Try to return their attention to the Marketplace and how you can help them with specific needs and questions about health coverage. Avoid discussing unrelated topics.

Remember these best practices:

- If consumers have a specific need or question related to coverage, respond in the way that you usually would.
- If there isn't a specific need or question related to coverage, you should tell consumers about the services that you provide and also suggest that another type of organization or individual might be able to help with other issues (e.g., a social worker). If you provide a referral to another organization or individual, be sure to follow CMS guidance to ensure that the referral is provided in a fair, accurate, and impartial manner.
- If consumers continue to discuss topics unrelated to coverage, you should politely let them know that assistance with these topics is not your role and that it's important to focus the conversation on health coverage.
- If you're unsure how to respond to consumers who don't have a specific need or question related to coverage, encourage them to return to your office at another time with any specific health coverage-related needs or questions and then conclude the meeting.



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You may meet with consumers who want to talk about other issues or move your discussion off topic. Try to return their attention to the Marketplace and how you can help them with specific needs and questions about health coverage. Avoid discussing unrelated topics.

Remember these best practices:

- If consumers have a specific need or question related to coverage, respond in the way that you usually would.
- If there isn't a specific need or question related to coverage, you should tell consumers about the services that you provide and also suggest that another type of organization or individual might be able to help with other issues (e.g., a social worker). If you provide a referral to another organization or individual, be sure to follow CMS guidance to ensure that the referral is provided in a fair, accurate, and impartial manner.
- If consumers continue to discuss topics unrelated to coverage, you should politely let them know that assistance with these topics is not your role and that it's important to focus the conversation on health coverage.

If you're unsure how to respond to consumers who don't have a specific need or question related to coverage, encourage them to return to your office at another time with any specific health coverage-related needs or questions and then conclude the meeting.

Consumers with Cognitive Impairments or Intellectual Disabilities

Customer Service Basics Text Version  Exit Course

Consumers with Cognitive Impairments or Intellectual Disabilities

You may meet with some consumers who have cognitive impairments or intellectual disabilities. Remember that you should avoid asking consumers if they have cognitive impairments or intellectual disabilities or saying you think they do. To the extent possible, consumers seeking health coverage should be the primary source of information and decision making about health coverage, even if consumers are accompanied by caregivers, authorized representatives, guardians, or family members. When others are authorized to represent consumers, it's good to make sure that consumers are the focus of the discussion and participate in the conversation to the greatest extent possible. You should not assume that people with disabilities have Medicaid or that they don't have a job, and you should always make sure consumers with disabilities have access to reasonable modifications and/or auxiliary aids and services while you're helping them.

Other tips to keep in mind:

- Frequently check with consumers to make sure they understand the information that you're sharing with them.
- Don't only address or make eye contact with a person that accompanies a consumer with a cognitive impairment or intellectual disability. The additional person is often present to help the consumer understand health coverage options and to assist with the eligibility and enrollment process.
- Don't assume that slurred speech is a sign of substance abuse, cognitive impairment, or intellectual disability; it may be a result of medication, treatment, or another kind of health issue.
- Be patient. Your role is to help consumers make the right health coverage choices for themselves and their families. You may be their only resource for knowledgeable, unbiased information.
- Consider collecting resources from other organizations that specialize in helping consumers with cognitive impairments or intellectual disabilities.

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You may meet with some consumers who have cognitive impairments or intellectual disabilities. Remember that you should avoid asking consumers if they have cognitive impairments or intellectual disabilities or saying you think they do. To the extent possible, consumers seeking health coverage should be the primary source of information and decision making about health coverage, even if consumers are accompanied by caregivers, authorized representatives, guardians, or family members. When others are authorized to represent consumers, it's good to make sure that consumers are the focus of the discussion and participate in the conversation to the greatest extent possible. You should not assume that people with disabilities have Medicaid or that they don't have a job, and you should always make sure consumers with disabilities have access to reasonable modifications and/or auxiliary aids and services while you're helping them.

Other tips to keep in mind:

- Frequently check with consumers to make sure they understand the information that you're sharing with them.
- Don't only address or make eye contact with a person that accompanies a consumer with a cognitive impairment or intellectual disability. The additional person is often present to help the consumer understand health coverage options and to assist with the eligibility and enrollment process.
- Don't assume that slurred speech is a sign of substance abuse, cognitive impairment, or intellectual disability; it may be a result of medication, treatment, or another kind of health issue.
- Be patient. Your role is to help consumers make the right health coverage choices for themselves and their families. You may be their only resource for knowledgeable, unbiased information.
- Consider collecting resources from other organizations that specialize in helping consumers with cognitive impairments or intellectual disabilities.

Resources for Providing Linguistically Appropriate Services

Customer Service Basics Text Version Exit Course

Resources for Providing Linguistically Appropriate Services

You may work with consumers who have limited English proficiency (LEP). Your organization must provide information in a manner that is culturally and linguistically appropriate to meet the needs of the population being served. You and your organization must also provide LEP consumers with information and assistance in their preferred language(s) at no cost. In some cases, you may have to refer consumers to the FFM Call Center or to another assister in your FFM's service area who is able to help. For example, you may need to do this if you do not have the resources to serve a consumer who speaks a specific language. In making such a referral, your goal should be helping the consumer find assistance with a minimum level of effort and disruption on the consumer's behalf.

Please note that CMS does not require certified application counselors (CACs) to provide culturally and linguistically appropriate services. However, CMS expects CACs to provide appropriate referrals to geographically accessible Navigators and/or the FFM Call Center if they are unable to assist a consumer with LEP.

For more information about providing culturally and linguistically appropriate services you can read "[Getting Help in a Language Other than English](#)," a CMS fact sheet written in the major languages spoken in the United States with instructions for calling the FFM Call Center. A print-ready version is available at [Marketplace.cms.gov](#).

Getting Help in a Language Other than English

If you, or someone you're helping, has questions about the Health Insurance Marketplace, you have the right to get help and information in your language at no cost. To talk to an interpreter, call 1-800-318-2596.

Here's a listing of the available languages and the same message provided above in those languages:

አማርኛ (Amharic)
በአገራችሁ ቋንቋ ፡ ካለዎንም ከፍተኛ በጻፉ አርዳታም ሆን መረጃ ማግኘት መብታችሁ ነው። በገበያ ውስጥ ስለተዘረጉት የጤና ጥበቃ አገዥ ሰጪዎችን በተመለከተ በአማርኛ ቋንቋ በበለጠ ለመረዳት ከአስተርጓሚ ጋር ለመደገፍ ከፈለጋችሁ በዚህ ስልክ ደውሉ 1-800-318-2596.

العربية (Arabic)
لك الحق في الحصول على المساعدة والمعلومات في اللغة الخاصة بك مجاناً. وللتحدث مع مترجم في اللغة العربية حول سوق التأمين الصحي، يرجى الاتصال على 1-800-318-2596.

中文 (Chinese)
你有權利免費用您的語言獲得幫助和資訊。要用中文與傳譯員探討健康保險市場，請致電 1-800-318-2596。

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You may work with consumers who have limited English proficiency (LEP). Your organization must provide information in a manner that is culturally and linguistically appropriate to meet the needs of the population being served. You and your organization must also provide LEP consumers with information and assistance in their preferred language(s) at no cost. In some cases, you may have to refer consumers to the FFM Call Center or to another assister in your FFM's service area who is able to help. For example, you may need to do this if you do not have the resources to serve a consumer who speaks a specific language. In making such a referral, your goal should be helping the consumer find assistance with a minimum level of effort and disruption on the consumer's behalf.

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Knowledge Check

Customer Service Basics Text Version Exit Course

Knowledge Check



You scheduled an appointment with Guang. Unfortunately, you're running a few minutes late with another consumer and ask Guang to wait five more minutes. Guang appears agitated and shouts, "I've been waiting here for 30 minutes already and I have other things to do. I came here because I really need to speak with someone since I don't understand Obamacare." What's the most appropriate way to respond to him?

Choose **all that apply** and then select **Check Your Answer**.

- A. Focus on the facts but also share your opinions about health care reform.
- B. Let Guang know that you both share the same goal of finding positive outcomes.
- C. Without arguing, try to see the situation from Guang's perspective, always remaining calm and patient.
- D. Don't agree with or encourage Guang's emotions.

 **Check Your Answer**

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You scheduled an appointment with Guang. Unfortunately, you're running a few minutes late with another consumer and ask Guang to wait five more minutes. Guang appears agitated and shouts, "I've been waiting here for 30 minutes already and I have other things to do. I came here because I really need to speak with someone since I don't understand Obamacare." What's the most appropriate way to respond to him?

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- B. Let Guang know that you both share the same goal of finding positive outcomes.
- C. Without arguing, try to see the situation from Guang's perspective, always remaining calm and patient.
- D. Don't agree with or encourage Guang's emotions.

The correct answers are B, C, and D. In this scenario, it's best to focus on the facts without sharing your own opinions about health care reform. Let Guang know that you both share the same goals and try to see the situation from his perspective without encouraging his emotions.

Key Points

Customer Service Basics Text Version ON Exit Course

Key Points



- 01** You play an important role in making sure consumers get friendly, objective, culturally appropriate, and impartial help when they're exploring options for health coverage through the Marketplaces.
- 02** Although consumers may come to you with a variety of challenging situations, you should always treat them with respect and consider applying the best practices shared in this training.
- 03** You should recognize a situation when it might make sense to refer consumers to other types of assistance or to a colleague or supervisor. Follow all applicable CMS guidance about working with outside organizations before making a referral to an organization that is not another assister organization or a Department of Health and Human Services (HHS) entity.
- 04** Check with consumers frequently to make sure that they understand the information you're presenting. Know what resources are available to you when dealing with complicated situations.

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- You play an important role in making sure consumers get friendly, objective, culturally appropriate, and impartial help when they're exploring options for health coverage through the Marketplaces.
- Although consumers may come to you with a variety of challenging situations, you should always treat them with respect and consider applying the best practices shared in this training.
- You should recognize a situation when it might make sense to refer consumers to other types of assistance or to a colleague or supervisor. Follow all applicable CMS guidance about working with outside organizations before making a referral to an organization that is not another assister organization or a Department of Health and Human Services (HHS) entity.
- Check with consumers frequently to make sure that they understand the information you're presenting. Know what resources are available to you when dealing with complicated situations.

Community Outreach and Strategies

Introduction

Community Outreach and Strategies Text Version OR Exit Course

Introduction

If you are a Navigator, you will want to increase consumers' awareness of the Marketplaces through education and outreach activities. It's important that you understand how to connect with consumers in your community so that you can educate them about the Marketplaces and their health coverage options.

- 01 Goals**
Describe the goals of community outreach
- 02 Role of Navigators**
State the role of Navigators in conducting community outreach
- 03 Outreach Strategy**
List the steps to create an effective outreach strategy and best practices to conduct community outreach
- 04 Outreach Examples**
Describe examples of outreach activities that might be effective in your community

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Goals

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Role of Navigators

State the role of Navigators in conducting community outreach

Outreach Strategy

List the steps to create an effective outreach strategy and best practices to conduct community outreach

Outreach Examples

Describe examples of outreach activities that might be effective in your community

Description of Community Outreach

Community Outreach and Strategies Text Version Exit Course

Description of Community Outreach

Community outreach involves providing information and services to consumers in your service area and connecting with hard-to-reach consumers.

Outreach activities should be tailored to address the specific needs of your community. For example, if you are going to conduct outreach activities in an area where there is a large American Indian population, be sure to emphasize all of the protections and benefits this population has through the Marketplaces (for example, the zero cost sharing plan variation available to them and their ability to change plans once a month).

It's also important to understand the difference between outreach and solicitation. Under CMS assister regulations, you may not contact consumers directly to help them apply for or enroll in Marketplace coverage if they didn't initiate, request, or give prior consent to the contact unless you or your assister organization have a pre-existing relationship with the consumers. This rule doesn't apply to public education and outreach activities. You and your assister organization must also comply with any state and federal laws that may apply to directly contacting consumers.

The goals of community outreach are to:

- 01 Increase awareness about the PPACA, including the Marketplaces and requirements for individuals and employers.
- 02 Improve understanding about health coverage options available through the Marketplaces and where consumers can go for help.
- 03 Give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer health coverage to their employees through the Marketplaces.

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Community outreach involves providing information and services to consumers in your service area and connecting with hard-to-reach consumers.

Outreach activities should be tailored to address the specific needs of your community. For example, if you are going to conduct outreach activities in an area where there is a large American Indian population, be sure to emphasize all of the protections and benefits this population has through the Marketplaces (for example, the zero cost sharing plan variation available to them and their ability to change plans once a month).

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Community Outreach and Strategies

Community Outreach and Strategies

Text Version Exit Course

Community Outreach and Strategies

Here are some examples of community outreach activities you might try:

- Participating in radio programs and conducting live interviews.
- Including information about health coverage in a state's energy assistance program mailing.
- Engaging the United States Department of Agriculture (USDA) Extension programs.
- Distributing outreach materials to local organizations, such as community centers and libraries.
- Setting up tables at community events to pass out information, talking to consumers, and advising them of the services that your organization provides to the public.
- Reaching out to community organizations to let them know that you're available to help.
- Going door to door to conduct general consumer education or outreach (without soliciting application or enrollment assistance), letting the community know that you're available to provide information and assistance.

Note: When an assister asks others to distribute materials created by HHS, HHS's authorship of the materials must be disclosed.



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Here are some examples of community outreach activities you might try:

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- Setting up tables at community events to pass out information, talking to consumers, and advising them of the services that your organization provides to the public.
- Reaching out to community organizations to let them know that you're available to help.
- Going door to door to conduct general consumer education or outreach (without soliciting application or enrollment assistance), letting the community know that you're available to provide information and assistance.

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Knowledge Check

Community Outreach and Strategies Text Version Off Exit Course

Knowledge Check



Connie is an assister conducting outreach activities in a new community. Which of the following goals are important to her outreach efforts?

Choose **all that apply** and then select **Check Your Answer**.

- A. Give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer coverage to their employees through the Marketplaces.
- B. Help ensure that her organization enrolls more individuals than any other similar organizations in her community.
- C. Increase awareness about the PPACA, including the Marketplaces and requirements for individuals and employers.
- D. Improve understanding about the health coverage options available through the Marketplaces and where consumers can go for help.

 **Check Your Answer**

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Connie is an assister conducting outreach activities in a new community.

Which of the following goals are important to her outreach efforts?

- A. Give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer coverage to their employees through the Marketplaces.
- B. Help ensure that her organization enrolls more individuals than any other similar organizations in her community.
- C. Increase awareness about the PPACA, including the Marketplaces and requirements for individuals and employers.
- D. Improve understanding about the health coverage options available through the Marketplaces and where consumers can go for help.

The correct answers are A, C, and D. Connie should give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer health coverage to their employees through the Marketplaces. In addition, she should help increase awareness about the PPACA requirements for individuals and employers. She should also help improve understanding in the community about health coverage options and how to get help through the Marketplaces.

Your Role in Community Outreach

Community Outreach and Strategies Text Version ON Exit Course

Your Role in Community Outreach

If you're a Navigator, you're responsible for building relationships in the community. These relationships will be helpful as you plan your community outreach activities.

As part of community outreach, you should:

- Use knowledge about your community to tailor information and services to its specific needs.
- Act as a resource where consumers can get free and unbiased information about getting health coverage.
- Plan events that provide information about the FFMs, health coverage options, and the assistance you and other FFM-approved organizations provide.
- Reach out to organizations in your community to further spread your message.

Know that special considerations apply when you work with local agents and brokers. CMS guidance on this topic is available at [Marketplace.cms.gov/technical-assistance-resources/agents-and-brokers-guidance-for-assisters.PDF](https://www.cms.gov/technical-assistance-resources/agents-and-brokers-guidance-for-assisters.PDF). You should connect with local coalitions to find out what events and outreach activities they have planned and coordinate efforts. Many communities already have partnerships and coalitions to increase awareness about health coverage options available through the Marketplaces.



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Outreach: Best Practices

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices

When conducting outreach, you should consider following these best practices:
Select each icon to learn more.



Consider the Needs of Your Community
Community Organization
Privacy
Social Media
Contact Information
Follow-up Outreach
Referrals
PII
Secure

Consider the Needs of Your Community

Consider the needs of your community when you choose how and where you'll conduct outreach.

Finally, under CMS assister regulations, although you may conduct door-to-door educational outreach, you **must not** solicit or offer application or enrollment assistance by going door to door to consumers who have not initiated the contact or with whom you do not have a prior relationship.

Menu Help Glossary Resources Map Module 3 of 3 Page 6 of 19

When conducting outreach, you should consider following these best practices:

- **Consider the Needs of Your Community** - Consider the needs of your community when you choose how and where you'll conduct outreach.
- **Community Organizations** - Reach out to community organizations so they know you are available to help consumers (for example, schools, libraries, faith-based organizations, local radio programs, local newspapers, and local businesses).
- **Privacy** - Always make consumers' privacy a priority. Under CMS assister regulations, you can't make cold calls or send unsolicited emails to solicit or provide application or enrollment assistance. You may call or email a consumer to solicit or provide application or enrollment assistance only if you have a pre-existing relationship with the consumer or if the consumer has initiated, requested, or given prior consent to the contact. Remember that you must also comply with all other applicable state and federal laws.
- **Social Media** - Use the social media tools available at Marketplace.cms.gov to conduct outreach and bring awareness about health coverage to your community. Remember, under CMS assister regulations, it's not appropriate to contact specific individuals through social media to solicit or provide application or enrollment assistance unless you have a pre-existing relationship with the individuals or they have initiated, requested, or given prior consent to the contact, and you have complied with all other applicable state and federal laws.
- **Contact Information** - You may collect consumers' contact information via sign-in sheets and information cards (paper or digital) if you make it clear to consumers in writing that by providing their contact information they are consenting to be contacted for application or enrollment assistance. Any personally identifiable information (PII) collected on a sign-in sheet or information card should be maintained privately and securely and access to it should be given only to staff who need to access it to carry out required duties. If and when you follow up with the consumer, you should obtain a more complete consent to access the consumer's PII for purposes related to your authorized assister functions.

- **Follow-up Outreach** - Conduct follow-up outreach with existing consumers during appropriate times of the year: after an individual is first identified, before scheduled appointments (reminders), and before a new individual market Open Enrollment Period (OEP).
- **Referrals** - If consumers want to refer friends or relatives to you, you may provide your contact information (for example, a business card) for them to share. Friends or relatives of the consumers you assist should generally contact you directly, unless you can confirm that third parties who share consumers' contact information with you have obtained consumers' consent to share their PII with you or your organization.
- **PII** - Remember to maintain a record of consumers' consent to access their PII for purposes related to your authorized assister functions in a secure manner for at least six years, unless a different and longer retention period has already been provided under other applicable federal law, in accordance with CMS assister regulations.
- **Secure** - If consumers mistakenly or accidentally leave behind PII at a facility or enrollment event, store the documents in a safe, locked location, and return PII to consumers as soon as possible.

Finally, under CMS assister regulations, although you may conduct door-to-door educational outreach, you **must not** solicit or offer application or enrollment assistance by going door to door to consumers who have not initiated the contact or with whom you do not have a prior relationship.

Outreach: Best Practices

Community Outreach and Strategies Text Version ON Exit Course

Outreach: Best Practices

Remember that you should consider the needs of your community when you choose how and where you'll conduct outreach. With that in mind, imagine you are conducting outreach in a community where there is a large immigrant population. Which of the following would be good examples of tailoring your outreach campaign to this population? Select either GOOD or NOT GOOD for each example.

| | | | |
|---|---|--|---|
| <p>Asking if there are any illegal immigrants present at the meeting</p> <p>NOT GOOD!</p> <p><input type="button" value="GOOD"/> <input type="button" value="NOT GOOD"/></p> | <p>Discussing some of the immigration documents that may be submitted to the FFMs to show proof of a consumer's immigration status</p> <p>GOOD!</p> <p><input type="button" value="GOOD"/> <input type="button" value="NOT GOOD"/></p> | <p>Discussing when and whether immigrants can access Medicaid or CHIP</p> <p>GOOD!</p> <p><input type="button" value="GOOD"/> <input type="button" value="NOT GOOD"/></p> | <p>Asking any suspected immigrants if they have family members currently overstaying their visas</p> <p>NOT GOOD!</p> <p><input type="button" value="GOOD"/> <input type="button" value="NOT GOOD"/></p> |
|---|---|--|---|

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Remember that you should consider the needs of your community when you choose how and where you'll conduct outreach.

With that in mind, imagine you are conducting outreach in a community where there is a large immigrant population.

Which of the following would be good examples of tailoring your outreach campaign to this population?

Asking if there are any illegal immigrants present at the meeting – Not good

Discussing some of the immigration documents that may be submitted to the FFMs to show proof of a consumer's immigration status - Good

Discussing when and whether immigrants can access Medicaid or CHIP – Good

Asking any suspected immigrants if they have family members currently overstaying their visas – Not good

Steps to Build a Successful Community Outreach Strategy

Community Outreach and Strategies Text Version Exit Course

Steps to Build a Successful Community Outreach Strategy

These steps show how you can start building a successful outreach strategy in your community.
Select each step to learn more.

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Step 7

Step 1: Identify Your Audience

The first step in developing an effective outreach strategy is to identify your audience.

As a best practice, start by asking yourself these key questions:

- How many consumers in my community are uninsured or underinsured?
- What kind of information do these consumers need?
- How do these consumers prefer to receive information about health coverage?
- Where do these consumers live, work, study, and play?

When creating your outreach strategy, it's a good idea to take into account the different segments of consumers in your community and identify the best ways to reach and help them. You may need to use different messages and ways of delivering those messages. Messages and messengers are equally important. For example, social media may be a good way to reach 18- to 24-year-old consumers. Remember, when using social media you can mention your role as an assister but you must keep your references generic such as letting people know the location where you'll be available for assistance. Don't mention any private information, such as consumers' specific names or medical conditions, unless consumers have provided specific, written consent for you to do so.

In-person meetings or presentations at libraries or faith-based organizations, as well as written materials including brochures, may be more useful for lower-income and older

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In-person meetings or presentations at libraries or faith-based organizations, as well as written materials including brochures, may be more useful for lower-income and older consumer groups.

Step 2: Identify Community Organizations That Serve Your Population of Focus

Once you've determined your key audiences, it's a good idea to reach out to other programs and organizations that serve the same communities.

You should think about:

- Existing programs and resources that already support your audience.
- Ways to coordinate with other organizations to inform consumers about the availability of health coverage through the Marketplaces.
- Following all applicable CMS guidance about working with outside organizations, including the guidance available at <https://marketplace.cms.gov/technical-assistance-resources/assister-guidance-on-referrals-to-outside-organizations.pdf>.

Here are some questions you might ask other organizations in the community to get started:

- Do you reach consumers from a specific ethnic or cultural group?
- What geographic regions does your organization cover?
- What is the age range of your audience?
- Do you have established ways of reaching your audience, such as newsletters, meetings, websites, or social media accounts?
- Does your organization have existing relationships with community organizations, or will you need to cultivate them?
- Do you reach consumers with Limited English Proficiency (LEP), and if so, what are these consumers' preferred non-English languages?

Step 3: Identify Materials Needed to Approach Consumers

Now that you've identified your audience and other organizations that work with those communities, it's a good idea to learn more about how you can identify effective messages and materials for your service area.

You could start by reviewing the materials available to download at [HealthCare.gov](https://www.healthcare.gov) and [Marketplace.CMS.gov](https://www.marketplace.cms.gov). If you can't find the information you want, or if you want to tailor materials to meet the needs of your audience, you may use existing content to develop tools and materials that work with your outreach strategy.

Examples include:

- Digital (Web) Outreach: Websites, social media channels, newsletters
- Face-to-Face Outreach: Brochures, flyers, presentations
- Media Outreach: Press releases, media kits, question-and-answer sheets

As you develop your tools and materials, consider these questions:

- Are any tested messages available?
- Are there written materials that I can repurpose or do I need to develop new materials?
- Are materials available in languages other than English?
- What resources and channels are available to help spread my messages?

Step 4: Identify Your Strengths and Weaknesses

The next step in developing an effective outreach strategy includes reviewing the information you gathered about your audience and other community organizations and knowing which tools and skills would help you to successfully implement your outreach strategies. Be sure to identify the strengths and weaknesses of each part of your outreach strategy.

Strengths

To determine the strengths in your outreach strategy, you should think about:

- Programs and resources that currently exist to support the community in which you work.
- How you can coordinate and integrate your services to serve your community to your fullest potential.
- How you can make the best use of your organization's strengths.

Weaknesses

To determine the weaknesses in your outreach strategy, you should ask yourself questions such as:

- Do I have the necessary relationships, including relationships with local media outlets, to ensure my message reaches as many consumers as possible?
- Do I have the necessary tools and messages to meet my community's specific needs for outreach? These could include documents available in alternate formats and in languages other than English.
- How will I fill any gaps in the community's relationships, messages, tools, or outreach skills?
- How experienced are other community organizations in conducting outreach efforts, leading programs, and networking within the community?
- Have I followed all applicable CMS guidance on working with outside organizations?

Step 5: Plan for Outreach

The next step in creating an effective outreach strategy is to develop timelines and fill in any details that are missing from your outreach work plan.

As you create your outreach plan, you should use the lists you've made so far and ask yourself:

- What are the best ways to distribute my materials? Remember, it is against federal law to place outreach or educational materials directly into a consumer's mailbox. Under CMS assister regulations, you may conduct outreach and education activities by going door to door or through other unsolicited means of direct contact, such as direct phone calls to consumers' homes, but you may not directly contact consumers to provide application or enrollment assistance or to schedule an appointment for assistance if they haven't requested or initiated the contact, or if you or your organization does not already have a relationship with the consumer.
- Am I working with other organizations that are available to help in my community? Remember, if you work with other organizations in your work as an FFM assister, you remain legally bound and responsible for all obligations to protect consumers' PII and are required to obligate the other organization to the same privacy and security standards that you must legally follow. You should also follow all applicable CMS guidance on working with outside organizations.
- Does my plan reflect significant Marketplace milestones and deadlines, such as important enrollment dates?
- Have I included strategies to reach all my key audiences?
- Do I have the appropriate resources to implement my work plan?

Once you answer these questions, you can develop a timeline for your outreach work plan.

Step 6: Get Buy-in

After you finalize your strategy and draft your outreach work plan, it's important to make sure you get buy-in and support for your expected outreach activities.

Ask yourself:

Have I talked with and received support from my organization?

Have I established appropriate relationships with community organizations?

Have other community organizations agreed to participate in planned activities?

When trying to get buy-in for your outreach work plan, make sure to communicate often and openly, accept suggestions, ask for help, and be sure to thank the community organizations that help you.

Step 7: Track, Monitor, Evaluate, and Refine Your Outreach Activities When Needed

Tracking, monitoring, evaluating, and refining your community outreach efforts will:

- Help you know if your plan is working.
- Examine the effects of your outreach in the community.
- Assist you in better identifying the needs of key audiences.
- Ensure you're spending resources (including time) in the right way.

- Identify the most effective strategies and help you build on best practices.
- Provide information to improve your outreach strategies.

Here are some ways to track, monitor, and evaluate your outreach efforts:

- Collect information on the number of consumers that you see each month and/or during each outreach event.
- Compare which outreach events are most effective at reaching your key audiences.
- Ask consumers how they learned about your outreach events and record their responses. Use this information to improve your outreach strategy at future events.
- Ask consumers how they heard about your organization. Keep a contact log of calls from consumers.
- Remember, PII collected from the consumer--including name, email address, telephone number, application ID number, addresses, or other notes--must be stored securely.

Evaluating your results will help you to refine your plans and strengthen your ability to reach the intended audience.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

Select the correct choice.

You analyze the characteristics of this population:

- Limited English Proficiency
- Fear of immigration enforcement
- Low Health Insurance Literacy
- Limited access to internet, email, or telephone
- Believe Marketplace plans are not affordable
- Fear of not being able to make monthly premium payment
- Complicated application process
- Insurance company notices hard to understand

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

Incorrect

Menu Help Glossary Resources Map Module 3 of 3 Page 9 of 19

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

You analyze the characteristics of this population:

- Limited English Proficiency
- Fear of immigration enforcement
- Low Health Insurance Literacy
- Limited access to internet, email, or telephone
- Believe Marketplace plans are not affordable
- Fear of not being able to make monthly premium payment
- Complicated application process
- Insurance company notices hard to understand

Steps

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

The correct answer is to identify your audience.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices (cont'd)

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

Select the correct choice.

You identify local Latino coalitions and establish contact with a local Latino grocery store.

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

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You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

You identify local Latino coalitions and establish contact with a local Latino grocery store.

Steps

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

The correct answer is to identify community organizations that serve your population of focus.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices (cont'd)

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

Select the correct choice.

After asking around, you discover that many Latinos in the community are unaware they may qualify for financial assistance to make health coverage more affordable. You and your colleagues think you should focus on three key messages:

- The importance of having health insurance.
- When does co-insurance for health services apply?
- Preventive services are available with no copayment.

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

Menu Help Glossary Resources Map Module 3 of 3 Page 11 of 19

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

After asking around, you discover that many Latinos in the community are unaware they may qualify for financial assistance to make health coverage more affordable. You and your colleagues think you should focus on three key messages:

- The importance of having health insurance.
- When does coinsurance for health services apply?
- Preventive services are available with no copayment.

Steps

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

The correct answer is to identify materials needed to approach consumers.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices (cont'd)

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

Select the correct choice.

You designed Spanish brochures that explain basic health insurance literacy concepts, but you heard another state's Department of Health developed and produced the video series, "Tu Salud Es Todo." The series consists of 12 half-hour episodes that provide information on health insurance programs and ways to access health care. The format was developed to meet the interest of the community through a Spanish-language soap opera (telenovela). The telenovela involves health issues affecting Latinos and the services the state provides. You realize maybe there is something better you can do rather than just creating a brochure.

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

Menu Help Glossary Resources Map Module 3 of 3 Page 12 of 19

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

You designed Spanish brochures that explain basic health insurance literacy concepts, but you heard another state's Department of Health developed and produced the video series, "Tu Salud Es Todo." The series consists of 12 half-hour episodes that provide information on health insurance programs and ways to access health care. The format was developed to meet the interest of the community through a Spanish-language soap opera (telenovela). The telenovela involves health issues affecting Latinos and the services the state provides. You realize maybe there is something better you can do rather than just creating a brochure.

Steps

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

The correct answer is to Identify your strengths and weaknesses.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices (cont'd)

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

Select the correct choice.

You realize some local consumers don't have enough information about the upcoming individual market Open Enrollment Period. Additionally, automatic re-enrollment dates are missing from some of your materials. Now you have to fix these materials and reevaluate your timeline regarding each milestone of your plan.

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

Menu Help Glossary Resources Map Module 3 of 3 Page 13 of 19

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

You realize some local consumers don't have enough information about the upcoming individual market Open Enrollment Period. Additionally, automatic re-enrollment dates are missing from some of your materials. Now you have to fix these materials and reevaluate your timeline regarding each milestone of your plan.

Steps

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

The correct answer is to plan for outreach.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices (cont'd)

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

Select the correct choice.

You are sending handwritten thank you notes to the local Latino grocer, who permitted you to set up an information booth outside the store.

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

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You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

You are sending handwritten thank you notes to the local Latino grocer, who permitted you to set up an information booth outside the store.

Steps

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

The correct answer is to get community buy in.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Outreach: Best Practices (cont'd)

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

Select the correct choice.

You have decided to ask consumers at your health fair how they learned about the event, and you'll use this information to improve your outreach strategy at future events.

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

Menu Help Glossary Resources Map Module 3 of 3 Page 15 of 19

You realize there is a large population of Latinos in your community who do not have health coverage and you would like to develop an outreach strategy for this particular group of consumers.

What step for creating an outreach strategy corresponds with the following outreach activity?

You have decided to ask consumers at your health fair how they learned about the event, and you'll use this information to improve your outreach strategy at future events.

Steps

Identify your audience.

Identify community organizations that serve your population of focus.

Identify materials needed to approach consumers.

Identify your strengths and weaknesses.

Plan for outreach.

Get community buy-in.

Track, monitor, evaluate, and refine your outreach activities when needed.

The correct answer is to track, monitor, evaluate, and refine your outreach activities when needed.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Knowledge Check



You and another assister, Adrienne, met with scout leaders, nurses, clergy, and consumers at a farmers' market. You've learned about the consumers in your community and the organizations that work with them. You know they rely on local faith-based organizations and hospitals for information. Still, it's a good idea to gather additional resources and develop an outreach plan that will help you target and reach these consumers. Which of the following activities should you and Adrienne do?

Choose **all that apply** and then select **Check Your Answer**.

- A. Identify your key audiences by ethnicity/culture, age, and income level so you can focus on where they are and how best to communicate with them.
- B. Identify other organizations that serve your community and gather information from them, including contact numbers, availability, and consumers they currently serve.
- C. Assume that local faith-based organizations and hospitals aren't interested in your work so you don't need to have any of your materials translated.
- D. Identify the best ways to reach each audience, such as flyers and meetings arranged through faith-based organizations, local hospitals, or social media.

Check Your Answer

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You and another assister, Adrienne, met with scout leaders, nurses, clergy, and consumers at a farmers' market. You've learned about the consumers in your community and the organizations that work with them. You know they rely on local faith-based organizations and hospitals for information. Still, it's a good idea to gather additional resources and develop an outreach plan that will help you target and reach these consumers. Which of the following activities should you and Adrienne do?

- A. Identify your key audiences by ethnicity/culture, age, and income level so you can focus on where they are and how best to communicate with them.
- B. Identify other organizations that serve your community and gather information from them, including contact numbers, availability, and consumers they currently serve.
- C. Assume that local faith-based organizations and hospitals aren't interested in your work so you don't need to have any of your materials translated.
- D. Identify the best ways to reach each audience, such as flyers and meetings arranged through faith-based organizations, local hospitals, or social media.

The correct answers are A, B, and D. Formally defining key audiences helps you identify how you can best reach consumers who need your help. Identifying and building relationships with community organizations that can help you engage key audiences will help you build an effective outreach strategy. Remember to follow all applicable CMS guidance about working with outside organizations, including the FFM assister privacy and security standards and the guidance available at [Marketplace.cms.gov/technical-assistance-resources/assister-guidance-on-referrals-to-outside-organizations.pdf](https://www.cms.gov/Marketplace/technical-assistance-resources/assister-guidance-on-referrals-to-outside-organizations.pdf).

Keeping Up With Marketplace News and Information

Community Outreach and Strategies Text Version Exit Course

Keeping Up With Marketplace News and Information

When communicating with consumers, it's important to have the latest, most accurate information available. You can sign up for updates directly at [HealthCare.gov](https://www.healthcare.gov) for the most up-to-date information about the Marketplaces. You can also check out videos and other resources available at [Marketplace.cms.gov](https://www.marketplace.cms.gov). CMS shares updates during weekly webinars and in newsletters. Other resources that are tailored to specific state issues, such as local nonprofit groups, may also be helpful.

You can keep up with the latest Marketplace news through other social media channels, including the following:

- YouTube: Watch [youtube.com/user/HealthCareGov](https://www.youtube.com/user/HealthCareGov) for videos highlighting important information about the Marketplaces.
- Facebook: "Like" [facebook.com/HealthCare.gov](https://www.facebook.com/HealthCare.gov) and share your thoughts.
- Twitter: Follow [@HealthCareGov](https://twitter.com/HealthCareGov) on Twitter for up-to-date Marketplace news.

You can share these links and encourage consumers to visit these sites.



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When communicating with consumers, it's important to have the latest, most accurate information available. You can sign up for updates directly at [HealthCare.gov](https://www.healthcare.gov) for the most up-to-date information about the Marketplaces. You can also check out videos and other resources available at [Marketplace.cms.gov](https://www.marketplace.cms.gov). CMS shares updates during weekly webinars and in newsletters. Other resources that are tailored to specific state issues, such as local nonprofit groups, may also be helpful.

You can keep up with the latest Marketplace news through other social media channels, including the following:

- **YouTube:** Watch [youtube.com/user/HealthCareGov](https://www.youtube.com/user/HealthCareGov) for videos highlighting important information about the Marketplaces.
- **Facebook:** "Like" [facebook.com/HealthCare.gov](https://www.facebook.com/HealthCare.gov) and share your thoughts.
- **Twitter:** Follow [@HealthCareGov](https://twitter.com/HealthCareGov) on Twitter for up-to-date Marketplace news.

You can share these links and encourage consumers to visit these sites.

Knowledge Check

Community Outreach and Strategies Text Version Exit Course

Knowledge Check



Rafael is an assister and is developing a strategy for his community outreach efforts.

Which of the following activities should he include to ensure that he creates a successful outreach strategy?

Choose **all that apply** and then select **Check Your Answer**.

- A. Get community buy-in.
- B. Identify his strengths and weaknesses.
- C. Monitor and evaluate his outreach activities.
- D. Identify his competitors.

 **Check Your Answer**

Menu Help Glossary Resources Map Module 3 of 3 Page 18 of 19

Rafael is an assister and is developing a strategy for his community outreach efforts.

Which of the following activities should he include to ensure that he creates a successful outreach strategy?

- A. Get community buy-in.
- B. Identify his strengths and weaknesses.
- C. Monitor and evaluate his outreach activities.
- D. Identify his competitors.

The correct answers are A, B, and C. Rafael should plan to get community buy-in, identify his strengths and weaknesses, and monitor and evaluate his outreach activities as part of his outreach strategy. Identifying his competitors isn't part of a successful outreach strategy.

Key Points

Community Outreach and Strategies Text Version ON Exit Course

Key Points



- 01** Developing an outreach strategy will help you effectively reach consumers in your community and educate them about their health coverage options.
- 02** You should identify audiences within your community and build your outreach strategy according to their unique needs.
- 03** Your outreach strategy should incorporate ways to engage community organizations to reach key audiences, as well as goals and benchmarks for tracking progress.
- 04** Evaluating your outreach strategy will help you build on best practices and identify ways to improve your strategy in the future.
- 05** You aren't alone. There are many other assister organizations doing this work that can provide resources and help with outreach planning and best practices.

Menu Help Glossary Resources Map Module 3 of 3 Page 19 of 19

- Developing an outreach strategy will help you effectively reach consumers in your community and educate them about their health coverage options.
- You should identify audiences within your community and build your outreach strategy according to their unique needs.
- Your outreach strategy should incorporate ways to engage community organizations to reach key audiences, as well as goals and benchmarks for tracking progress.
- Evaluating your outreach strategy will help you build on best practices and identify ways to improve your strategy in the future.
- You aren't alone. There are many other assister organizations doing this work that can provide resources and help with outreach planning and best practices.

Conclusion

Text Version Exit Course

Conclusion

Great job! You have learned about delivering friendly, objective, and impartial customer service. You should know how to handle challenging situations with consumers and plan community outreach activities.

You've successfully completed this course.
Select **Exit Course** to leave the course and take the Customer Service Standards and Community Outreach exam.

Menu Help Glossary Resources Map

Great job! You have learned about delivering friendly, objective, and impartial customer service. You should know how to handle challenging situations with consumers and plan community outreach activities.

You've successfully completed this course.

Resources

CuidadoDeSalud.gov:

This Spanish counterpart to HealthCare.gov serves as a resource where Spanish-speaking consumers can create a Marketplace account and access information about health coverage and the Marketplaces.

<https://www.cuidadodesalud.gov/es/>

HHS Office of Minority Health (OMH) Resource Library:

A library of resources available on the OMH website.

[Hclsig.thinkculturalhealth.hhs.gov/Content/Library.asp](https://hclsig.thinkculturalhealth.hhs.gov/Content/Library.asp)

Marketplace.CMS.gov:

Official CMS website offering information and resources on the Health Insurance Marketplaces.

<https://marketplace.cms.gov/>

HealthCare.gov Facebook Page:

Official HealthCare.gov Facebook page providing consumers with real-time updates and information about health coverage through the Marketplaces.

[Facebook.com/HealthCare.gov](https://www.facebook.com/HealthCare.gov)

HealthCare.gov Twitter Page:

Official HealthCare.gov Twitter page providing consumers with real-time updates and information about health coverage through the Marketplaces.

twitter.com/HealthCareGov

Getting Help in a Language Other than English:

A CMS document that provides instructions for accessing the FFM Call Center written in the major languages spoken in the United States.

[Marketplace.cms.gov/outreach-and-education/getting-help-in-a-language-other-than-english.pdf](https://marketplace.cms.gov/outreach-and-education/getting-help-in-a-language-other-than-english.pdf)