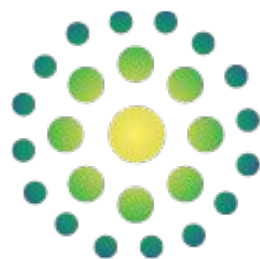




Best Practices for Growth Webinar #1: Pre-qualifying Leads



PACE 2.0

March 8, 2022

*Supported By: The John A. Hartford Foundation, West Health, and
The Harry and Jeanette Weinberg Foundation*

Support. Innovate. Lead.

Introductions

Welcome!



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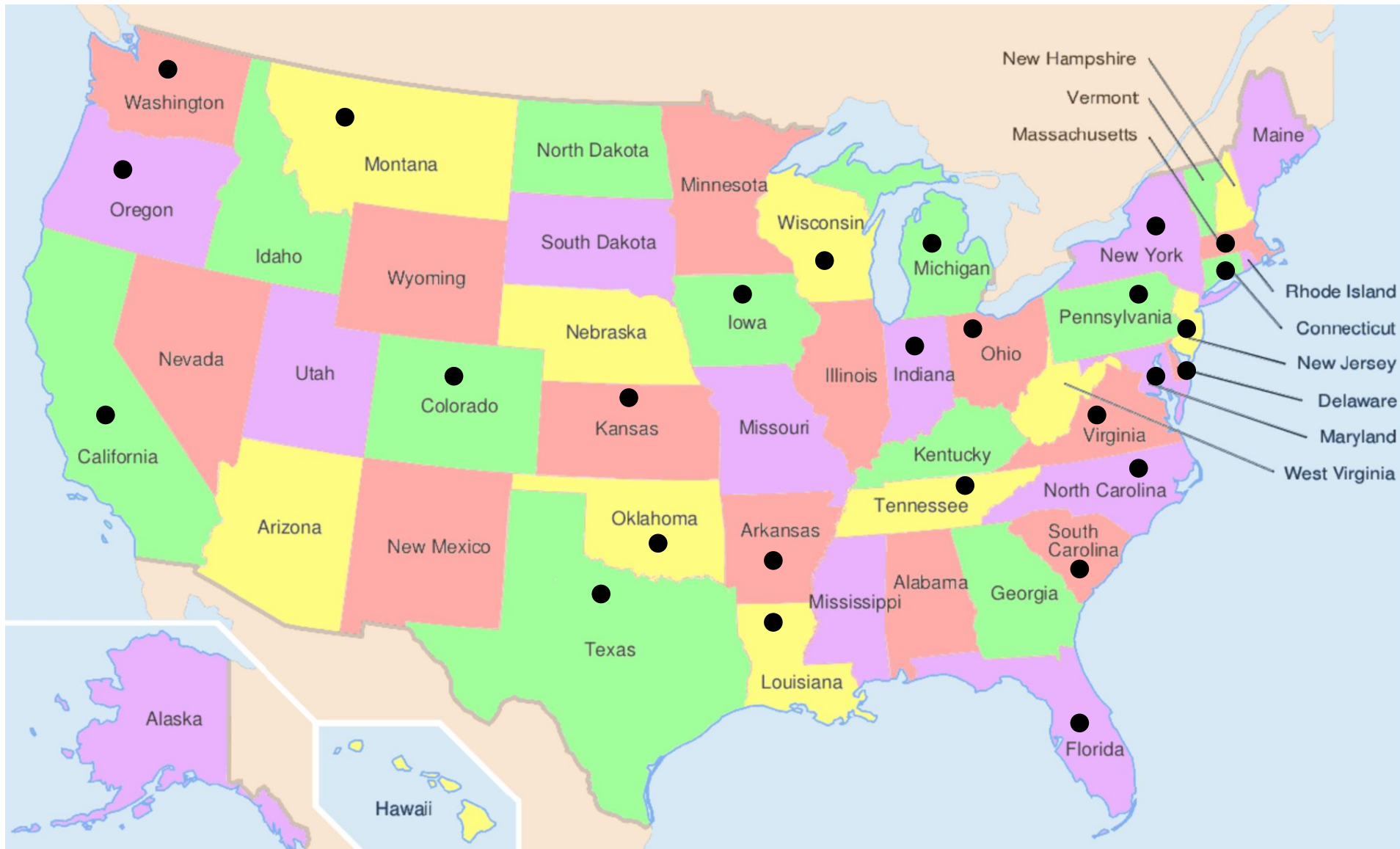


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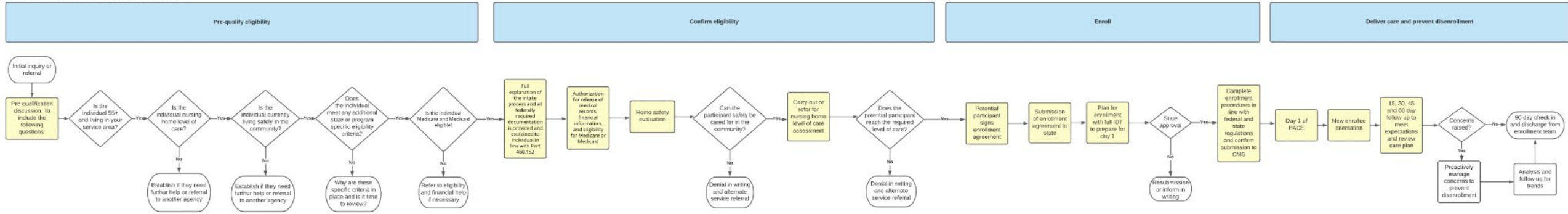
Agenda

- Welcome and introductions (5)
- Setup (10)
- Pre-qualifying eligibility overview (10)
- Case study (45)
- Application to your PACE organization (15)
- By next month (5)

Setup

12 Step Enrollment Process

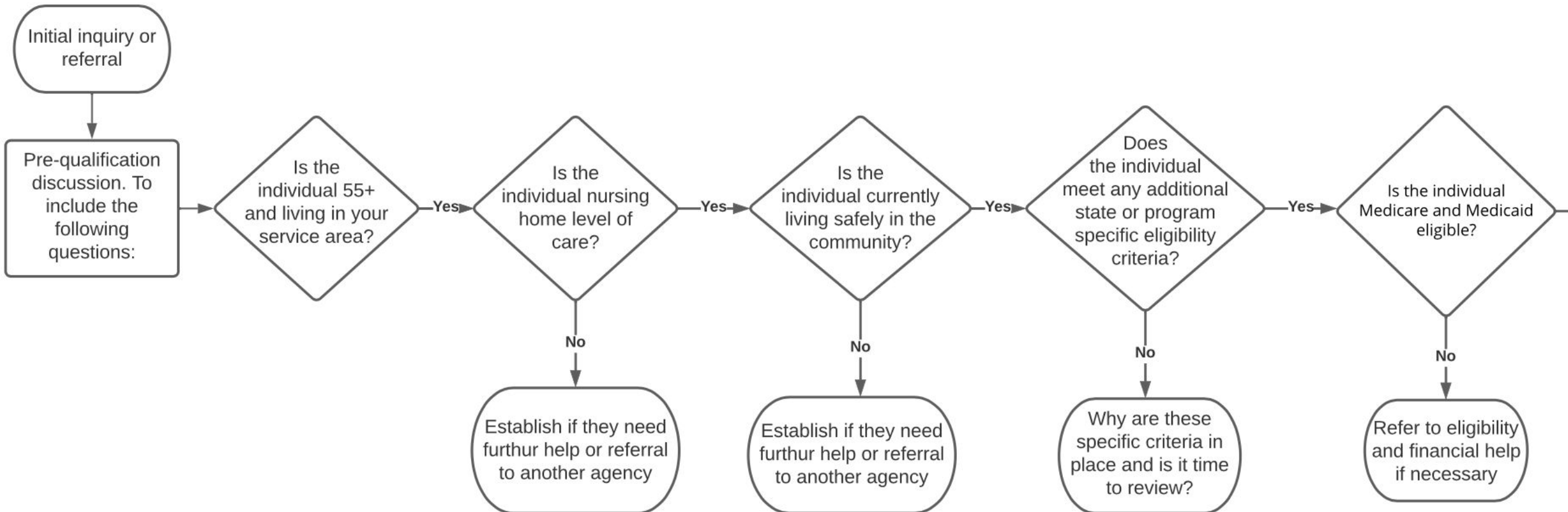
PACE Enrollment Process: Best Practices for Growth



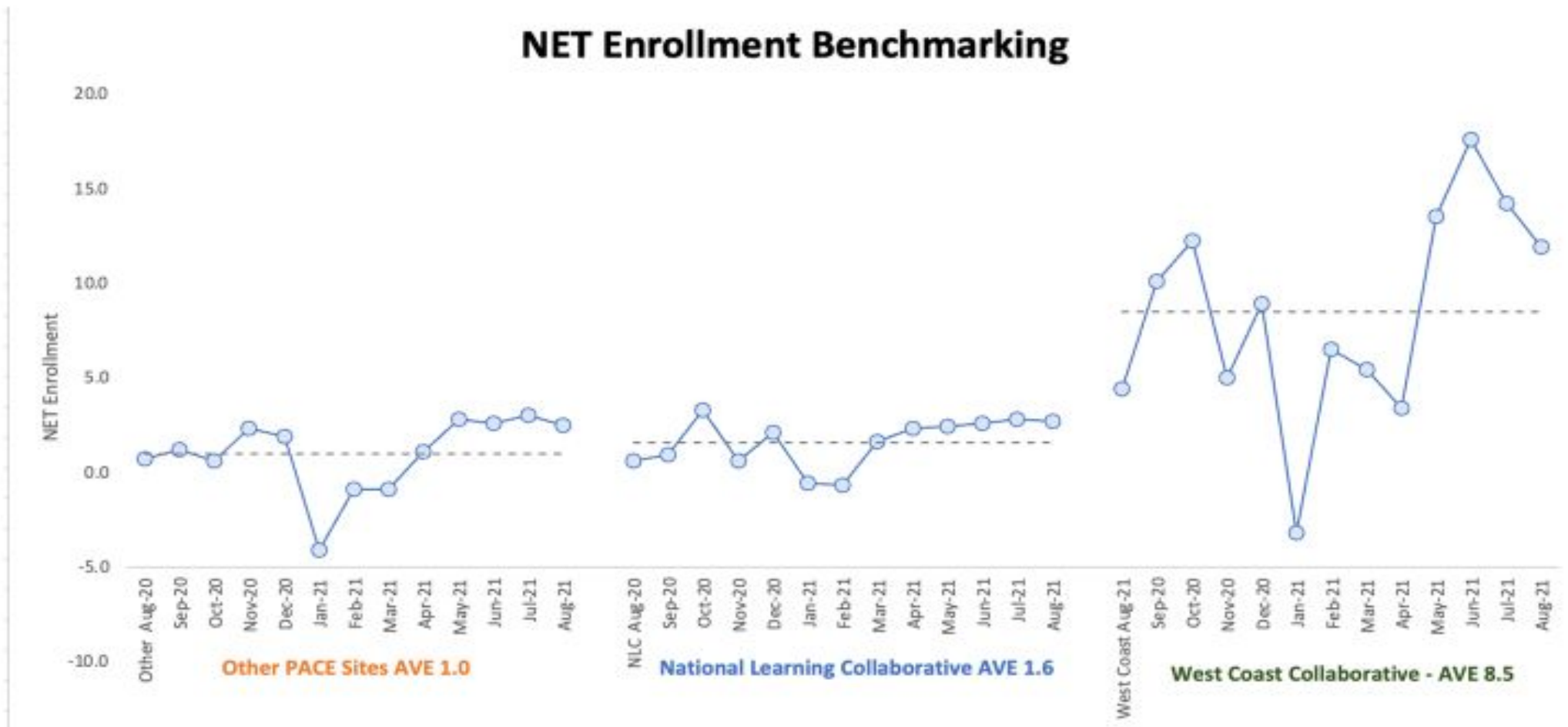
Today's subject

PACE Enrollment Process: Best Practices for Growth

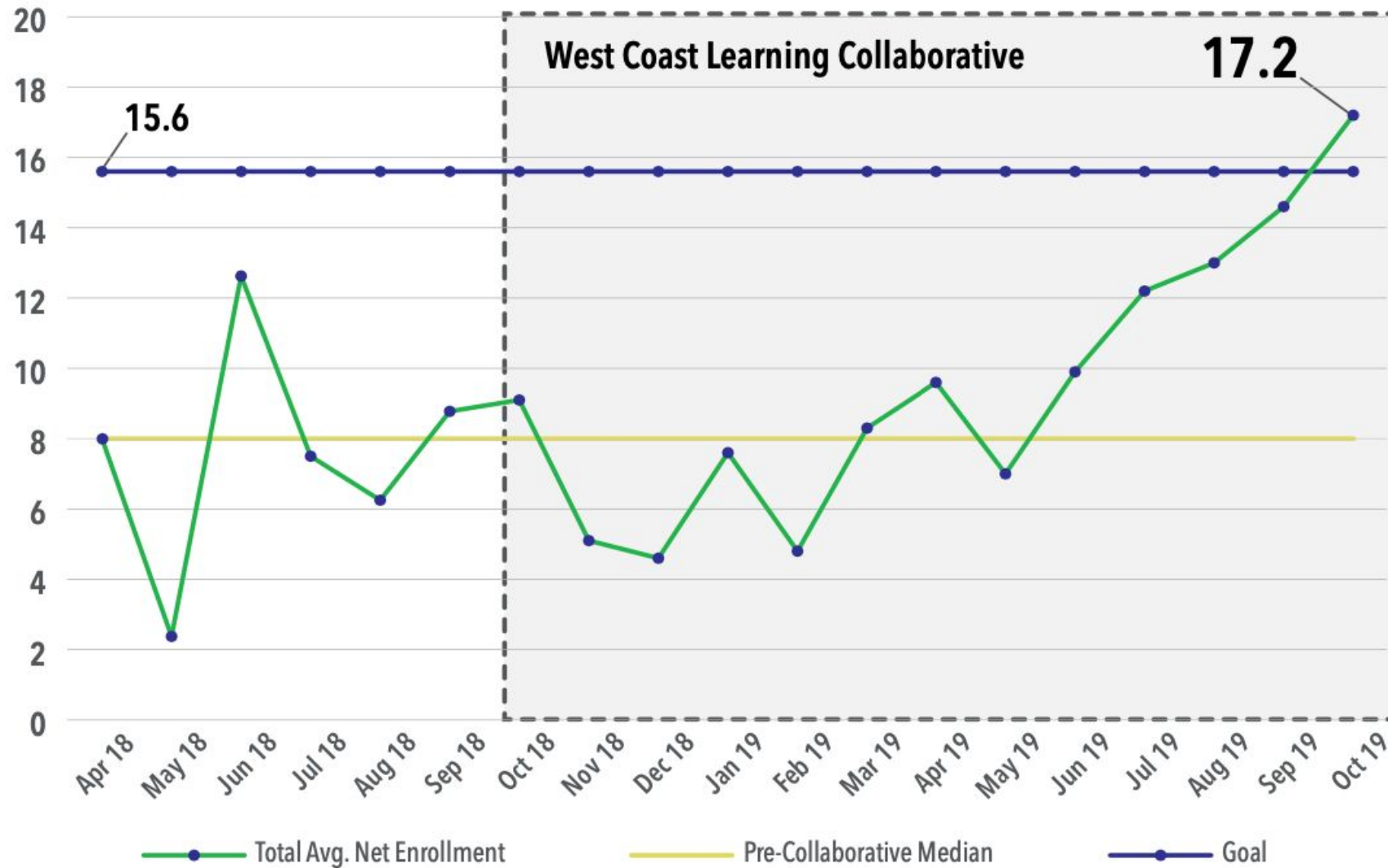
Pre-qualify eligibility



Why is this best practice?



PACE 2.0 West Coast Learning Collaborative Average Net Monthly Enrollment



West Coast post-collab



Learning objectives

- Understand a current state process map for enrollment in PACE
- Identify best practices for pre-qualifying eligible PACE participants
- Identify non-value added steps in your process for pre-qualifying eligible PACE participants
- Identify 1-2 changes to make to your current pre-qualification process to try with a prospective participant this month

Aims and measures

- Keep your aim in mind
- Use data to guide your decisions


Additional resources in NPA's Growth and Learning e-Community

Best practices for growth

Design for the majority (80%), not the exception (20%)



Pre-qualifying eligibility

A decorative graphic on the left side of the slide consisting of several overlapping, hand-drawn loops in shades of yellow, orange, and purple.

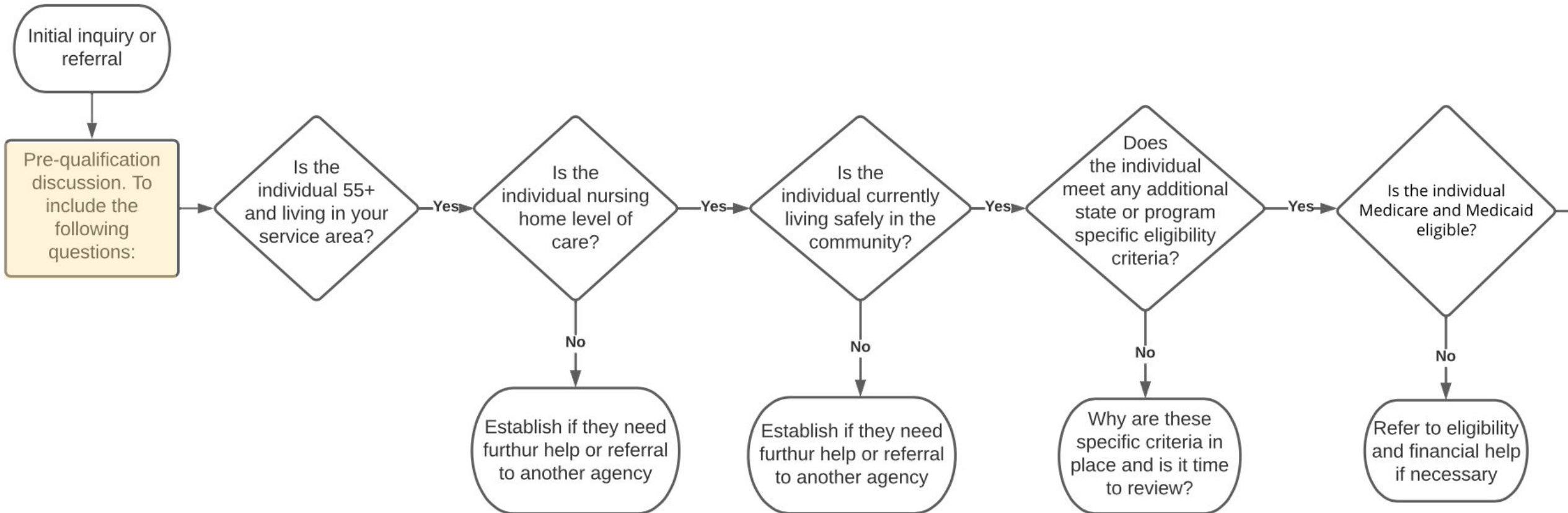
Your system is perfectly
designed to give you the
results that you are getting.

Embrace being uncomfortable.
If you're not uncomfortable, the change isn't enough.

Standard operating procedure

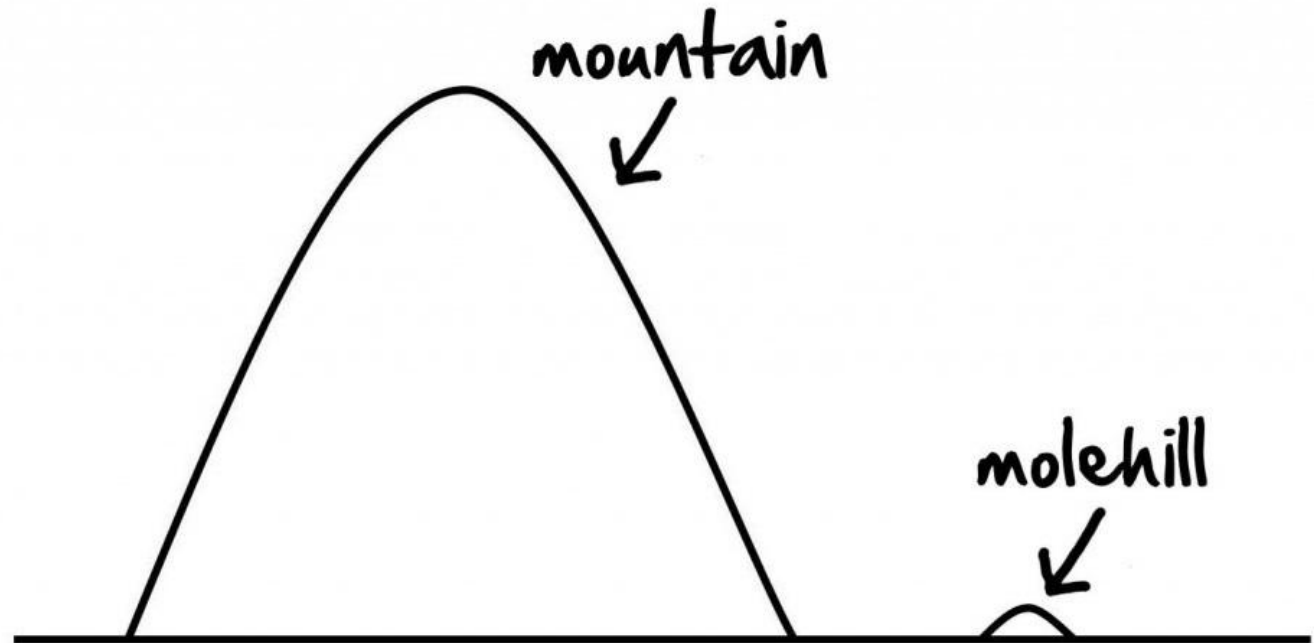
PACE Enrollment Process: Best Practices for Growth

Pre-qualify eligibility



If this isn't what you do

For each point of difference, be prepared to examine whether your extra/different steps add value to the potential participant or participant's caregiver.



Case study

Case Study

Annie called PACE Abbifer of Colorado during her lunch break on Monday to inquire about help for her mother. Annie's mother (Dorothy) lives on her own in an eligible zip code and her care needs have become more than Annie can manage on her own while maintaining a full time job. Jamie the enrollment specialist answers the phone. Annie describes that Dorothy, 78, had a fall four months ago and has lost confidence in her mobility. She has a wound on her leg and is a known diabetic who was widowed nine months ago.

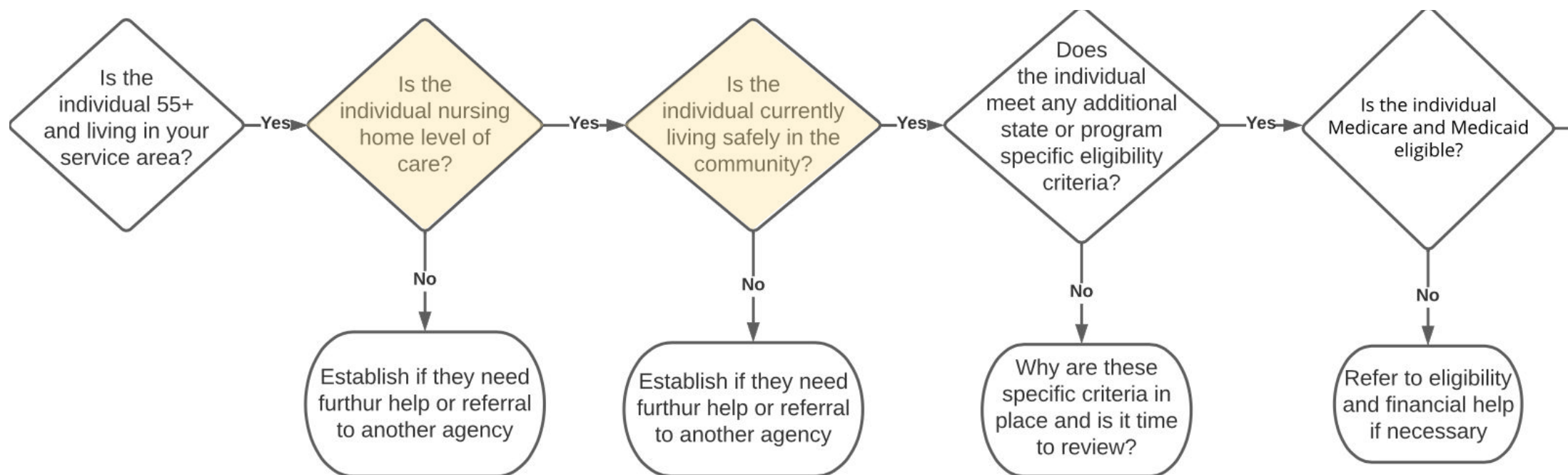
Help Jamie pre-qualify Dorothy for eligibility. How will Jamie...

- ...establish that Dorothy is the right level of care in five questions or fewer?
- ...establish that Dorothy is safe to live in the community in five questions or fewer?
- ...establish if any state specific rules apply?
- ...establish if Dorothy is Medicare and Medicaid eligible?

Breakouts

Script the five questions that Jamie should ask for each process decision step in order to pre-qualify Dorothy for eligibility in PACE.

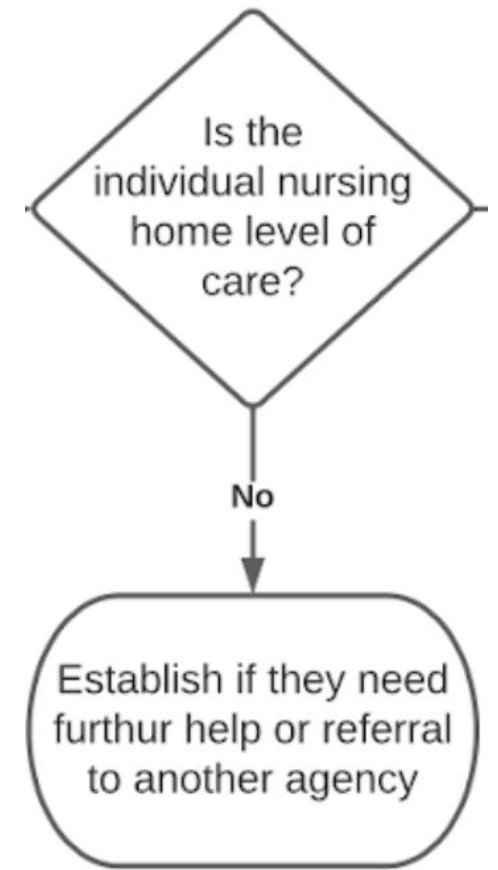
Is Dorothy eligible?



Nursing home level of care

What five questions will “future proof” the process so that anyone can step in and do the job?

1. Are you currently receiving (insert your state-specific LTC service that uses the same Level of Care)?
2. Who assists you in the home and what do they do?
3. Do you get assistance from another person with daily tasks, such as going to the bathroom, getting in and out of a chair/bed or eating food?
4. Have you had any falls?
5. Does anyone help you remember medications or to pay your bills?



Safety in the community

1. Are you (or is your loved one) currently living safely in the community?



Application to your PACE organization

Think of your most recent inquiry

Apply the nursing home level of care questions and safety in the community questions to your most recent inquiry.

- Did you arrive at the same decision about pre-qualifying eligibility?
- What else do you ask?
 - why?
 - why?
 - why?
 - why?
 - why?



Your turn

Where does your current process differ from what we have outlined?

For each different step:

- For whom does the step add value?
- How much time does the step add?
- Is the step capturing a majority of cases or a rare occurrence?
- Bottom line: Does it need to be different?

By next month

By next webinar

To do:

1. Examine your current process. Where does it need revision?
2. Try this standard process with at least one inquiry to pre-qualify a participant. Be prepared to share.

To prepare for the next webinar:

3. How many enrollments are sitting in your pipeline right now?
4. How long did the last five enrollments take?

Next up

April 12, 12:30-2 ET: Confirming eligibility webinar

Send us a “case” idea based on your process for confirming eligibility. tylerc@npaonline.org