### Policy Title
Initial Member Contact and Assessment

### Program
Indiana Chronic Disease Management Program (ICDMP)

### Established/Review Date
June 20, 2003 (OMPP Approved)
October 23, 2006 (OMPP Approved)

### Attachments
- A – Call Center Program Introduction Letter (CC Intro)
- B – Nurse Care Manager Program Introduction Letter (NCM Intro)
- C – Call Center Member Opt Out Letter (CC MOO)
- D – Call Center Welcome Letter 1 (CC W 1)
- E – Call Center Welcome Letter 2 (CC W 2)
- F – Nurse Care Manager Welcome Letter 1 (NCM W 1)
- G – Nurse Care Manager Welcome Letter 2 (NCM W 2)

### Purpose
The purpose of this policy is to define the process and procedures for contacting and engaging a new member in the Indiana Chronic Disease Management Program (ICDMP). This policy will outline the processes and procedures for introducing the program to new members, contacting members to complete an initial assessment, sending an initial Welcome Packet, and confirming an opt out decision for a low risk member. All activities will be documented in the Chronic Disease Management System (CDMS).

### Scope
AmeriChoice Care Coordinators, management staff and the Department Assistant will implement this policy.

### Policy
AmeriChoice will mail an introductory letter to all potential members (high and low risk) in the Indiana Chronic Disease Management Program (ICDMP). This initial mailing will be followed by three attempts to contact the low risk member and six attempts to contact the high risk member by phone to further explain the program, complete an initial assessment, offer the member educational materials specific to his/her disease state(s) and advise the member that additional contacts will be made at approximately sixty (60) day intervals. A Welcome Package will be sent out to each member whether phone contact was completed or not. If a low risk member declines participation in the program, the Care Coordinator will activate the “opt out” feature in CDMS and confirm this decision with the member by letter.

During each member contact, every effort will be made to engage the member to ensure greater success in improving their treatment compliance and overall health. The Care Coordinator will take special care to ensure that the material is presented in a manner appropriate to the educational and comprehension level of the member (or parent or guardian.) Special needs will be identified and considered during each interaction. If, at any time, the Care Coordinator determines that a higher level of intervention might be appropriate for a low risk member, the situation will be reviewed with the Call Center Nurse. (See the ICDMP Intervention Policy.)

### Procedure
AmeriChoice will mail an introductory letter (Attachments A and B) to each potential member identified through claims data as having a chronic disease that is included in the Indiana Chronic Disease Management Program.

AmeriChoice Care Coordinators will utilize the Chronic Disease Management System (CDMS) queues to complete contact activities. The management staff will use the system to monitor productivity and accuracy.
The Department Assistant will utilize the system to obtain mailing worklists for the Welcome letters and education materials.

After the introductory letter is mailed, the Care Coordinator will identify members to be contacted through the CDMS queues. The Care Coordinator will make three attempts to contact the low-risk member and six attempts to contact the high-risk member before information is mailed.

The Care Coordinator will take the following steps to complete the initial call and assessment:

1. Select the individual listed at the top of the Open Queue in CDMS.
2. Determine member’s eligibility in AIM. (Note: ineligible members will be removed from queue during the scheduled run of the planner.)
3. Return to CDMS and view the member demographic screen.
4. Review the member demographic information and determine a) if member has pediatric asthma, is a non-minor or if we need to speak with parent or guardian, b) if the member is an adult or teenager, c) what disease state has been identified through claims data. and, d) if demographic information needs to be updated.
5. Call the member.
6. Introduce self, using the dialog in CDMS call script.
7. Validate the appropriate individual (member or representative) using required HIPAA statement in the call script. (See HIPAA Policies and Procedures for Verification of Identity and Authority).
8. Explain the purpose of this call using the dialog in CDMS call script. If the member asks how they (or their child) have been identified for this program, advise them it is based on health and claims data received from their membership in Medicaid Select.
9. If the member agrees to continue with the call, proceed to 13.
10. If the member indicates they have already completed a survey about their health (Health Needs Screening for Medicaid Select), acknowledge this as indicated in the Call Center CDMS scenarios. If the member agrees, proceed to step 13.
11. If the member refuses to participate, use the dialogue in CDMS. Complete the opt out process and document in CDMS. Schedule an “Opt Out” letter mailing. (Attachment C)
12. Update the appropriate demographic information on the demographic screen. Only those areas in light blue may be updated by the Care Coordinator. This includes: work phone number, email address and information about a secondary or emergency contact. This is the location where information about the parent or guardian should be entered for future use. Should the member question why we are asking about a work number or email address, please advise that this information will allow us other ways to reach them in the future. Note: Most of these areas will be blank for the initial assessment.
13. Select the Assessment screen and complete the initial assessment.
14. End the call, document in CDMS and select the appropriate mailing(s).
15. CDMS will schedule the member for the next call in the call line.

While completing the contact tracking in CDMS, the Care Coordinator will identify the appropriate materials to be mailed. The selection will be made on the contact tracking screen and will immediately populate the mailing worklist that will be accessed daily by the Department Assistant. These selection choices include:

- **Member Opt Out Letter** (Attachment C)
- **Call Center Welcome Package 1** (Includes letter acknowledging contact with the low risk member - Attachment D, initial disease-specific educational materials and a program magnet that provides the Call Center toll-free number)
- **Call Center Welcome Package 2** (Includes letter advising of inability to contact the low risk member – Attachment E, disease-specific educational materials and a program magnet that provides the Call Center toll-free number)
- **NCM Welcome Package 1** (Includes letter acknowledging contact high risk member - Attachment F, disease-specific educational materials and a program magnet that provides the Call Center toll-free number)
- **NCM Welcome Package 2** (Includes letter advising of inability to contact the high risk member– Attachment G, disease-specific educational materials and a program magnet that provides the Call Center toll-free number)
On a routine basis, the Department Assistant will access CDMS to obtain the worklist of all materials to be mailed. This worklist will be used to prepare and mail out the appropriate materials – welcome package or opt out letter.
January 2006

Dear Member,

Welcome to the Indiana Chronic Disease Management Program, an added benefit to your Medicaid Select health care coverage. This is a program that will help members like you manage their long-term health problems such as sugar diabetes, asthma, high blood pressure or heart disease.

Care Coordinators from the Indiana Chronic Disease Management Program will be calling you several times a year to check on your condition, provide information, answer your questions, and help you manage your health care. You will get your first telephone call from a Care Coordinator in the next few weeks.

During the first call, you can expect the Care Coordinator to answer any questions you have about this new program. The Care Coordinator will also ask you a series of questions about your health, medications, health care equipment, and visits to doctors and hospitals. This information will help the Care Coordinator provide you with information and materials about your health condition. This first call will take only a few minutes and will help the Care Coordinator know what type of information you need.

Shortly after the first call, you will receive a welcome package that will give you information about the program and your health condition. If you are not available when we call, we will mail you an information package and ask you to call us at a toll-free number, 1-866-311-3101.

We would also like for you to call us on the toll-free number any time you go into the hospital. You may call us after you get home and tell us why you went into the hospital, any medication changes, and ask any questions you may have. By telling us this information we will be able to better meet your health care needs. If you cannot reach a Care Coordinator, please leave us a message and we will get back with you. We look forward to talking with you about ways that we can help you in managing your condition and overall health care.

Sincerely,

Care Coordination Services
Indiana Chronic Disease Management Program
January 2006

Dear Member,

Welcome to the Indiana Chronic Disease Management Program, an added benefit to your Medicaid Select health care coverage. This is a program that will help members like you manage their long-term health problems such as sugar diabetes, asthma, high blood pressure or heart disease.

Care Coordinators from the Indiana Chronic Disease Management Program will be calling you in the near future to check on your condition, provide information, answer your questions, and help you manage your health care. Also Nurse Care Managers will be talking with you about your health and answering any other questions that you may have. You will get your first telephone call from a Care Coordinator in the next few weeks.

During the first call you can expect the Care Coordinators to answer any questions you have about this new program. The Care Coordinator will also ask you a series of questions about your health, medications, health care equipment, and visits to your doctors. They will also ask you about any hospital admissions you may have had recently.

The Nurse Care Managers will be contacting you after the Care Coordinators talk with you. They will help you to better understand your medications, treatment plans prescribed by your doctor, and answer questions you may have about your illness. They will also provide you with additional information about your health condition.

If you are not available when we call, we will mail you an information package and ask you to call us at a toll free number, 1-866-311-3101. This number has someone available Monday through Friday from 8AM to 7 PM and on Saturdays from 8 AM to 1 PM.

Sincerely,

Care Coordination Services
Indiana Chronic Disease Management Program
March 21, 2006

Dear Member,

Thank you for talking with us about the Indiana Chronic Disease Management Program. We have noted for our records that you do not want to take part in this program right now.

If you change your mind and would like to participate in the program, please call a Care Coordinator in our Call Center. You can call toll-free at 1-866-311-3101. The Call Center is open from 8 AM to 7 PM, Monday through Friday and from 8 AM to 1 PM on Saturday. If the Call Center is closed, you can leave a message and we will call you back the next business day. Please be sure to leave your name, member ID number and a phone number where we can reach you.

To get more information about the program and your health, you can also visit our website at www.indianacdmprogram.com.

Sincerely,

Care Coordination Services
Indiana Chronic Disease Management Program
January 2006

Dear Member,

Welcome to the Indiana Chronic Disease Management Program! Thank you for taking the time to talk with us and answer our questions. This is your welcome package. It contains information about your health. We are also sending you a magnet with our toll-free number. Keep this magnet in a safe place so you will always know how to call a Care Coordinator. You can use the folder to store information about your health condition and the program.

You can expect another call in about three months. These telephone calls will help us know how well you are taking care of yourself and following your doctor’s advice. We will answer your questions. Also, if you go into the hospital, we would like for you to call us on the toll-free number. This will help us better meet your health care needs. You do not need to call us BEFORE you go into the hospital. Just let us know as soon as you can after you get home and we will answer any questions you might have then. We will send you more information that will help you do the right things to help you stay healthy. Remember: You can do many things to improve your health and the way you feel.

If you have any questions, please call a Care Coordinator at 1-866-311-3101. The Call Center is open from 8 AM to 7 PM, Monday through Friday and from 8 AM to 1 PM on Saturdays. If the Call Center is closed, you can leave a message and we will call you back the next business day. Please be sure to leave your name, member ID number, and a phone number where we can reach you.

To get more information about the program and your health, you can also visit our website at www.indianacdmprogram.com.

Sincerely,

Care Coordination Services
Indiana Chronic Disease Management Program
January 2006

Dear Member,

Welcome to the Indiana Chronic Disease Management Program! We have not been able to contact you by phone to talk with you about this program and your health condition. We wanted you to have this welcome package. It contains information about your health. We are also sending you a magnet with our toll-free number. Keep this magnet in a safe place so you will always know how to call a Care Coordinator. You can use the folder to store information about your health condition and the program.

You can expect another call in about three months. These telephone calls will help us know how well you are taking care of yourself and following your doctor’s advice. We will answer your questions. Also, if you go into the hospital, we would like for you to call us on the toll-free number. This will help us better meet your health care needs. You do not need to call us BEFORE you go into the hospital. Just let us know as soon as you can after you get home and we will answer any questions you might have then. We will send you more information that will help you do the right things to help you stay healthy. Remember: You can do many things to improve your health and the way you feel.

If you have any questions, please call a Care Coordinator at 1-866-311-3101. The Call Center is open from 8 AM to 7 PM, Monday through Friday and from 8 AM to 1 PM on Saturdays. If the Call Center is closed, you can leave a message and we will call you back the next business day. Please be sure to leave your name, member ID number, and a phone number where we can reach you.

To get more information about the program and your health, you can also visit our website at www.indianacdmprogram.com.

Sincerely,

Care Coordination Services
Indiana Chronic Disease Management Program
January 2006

Dear Member,

Welcome to the Indiana Chronic Disease Management Program! Thank you for taking the time out to talk with us and answer our questions. This is your welcome package. It contains information about your health. We are also sending you a magnet with our toll-free number. Keep this magnet in a safe place so you will always know how to call a Care Coordinator. You can use the folder to store information about your health condition and the program.

A Nurse Care Manager will contact you sometime in the future. They will also work with you to help you better manage your health care needs. They will answer your questions about your health and work with your doctor. They will talk with you about your diet, medications and answer any other questions you may have about your health.

Also, if you go into the hospital, we would like for you to call us on the toll-free number. This will help us better meet your health care needs. You do not need to call us BEFORE you go into the hospital. Just let us know as soon as you can after you get home and we will answer any questions that you may have then.

If you have any questions, please call a Care Coordinator at 1-866-311-3101. The Call Center is open from 8AM to 7 PM, Monday through Friday and from 8 AM to 1 PM on Saturdays. If the Call Center is closed, you can leave a message and we will call you back the next business day. Please be sure to leave you name, member ID number, and a phone number where we can reach you.

To get more information about the program and your health, you can also visit our website at www.indianacdmprogram.com.

Sincerely,

Care Coordination Services
Indiana Chronic Disease Management Program
January 2006

Dear Member,

Welcome to the Indiana Chronic Disease Management Program! We have not been able to contact you by phone to talk with you about this program and your health condition. We wanted you to have this welcome package. It contains information about your health. We are also sending you a magnet with our toll-free number. Keep this magnet in a safe place so you will always know how to call a Care Coordinator. You can use the folder to store information about your health condition and the program.

Please call us at the toll-free number shown below. We would like to answer any questions you have about the program. We would also like to ask you several questions about your health condition. Your answers to these questions will help us to find ways that will help you to manage your condition. A Nurse Care Manager will contact you sometime in the future. They will also work with you to help you better manage your health care needs. They will answer your questions about your health and work with your doctor. They will talk with you about your diet, medications and answer any other questions you may have about your health. Also, if you go into the hospital, we would like for you to call us on the toll-free number. This will help us better meet your health care needs. You do not need to call us BEFORE you go into the hospital. Just let us know as soon as you can after you get home and we will answer any questions that you may have then.

If you have any questions, please call a Care Coordinator at 1-866-311-3101. The Call Center is open from 8 AM to 7 PM, Monday through Friday and from 8am to 1 PM on Saturdays. If the Call Center is closed, you can leave a message and we will call you back the next business day. Please be sure to leave your name, member ID number, and a phone number where we can reach you.

To get more information about the program and your health, you can also visit our website at www.indianacdmprogram.com.

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Indiana Chronic Disease Management Program