

## Outreach and Enrollment Assists Reporting

The guidance below provides responses to questions regarding UDS reporting of outreach and enrollment (O/E) assists.

### **What should be reported as assists provided?**

Assists provided are defined as customizable education sessions about affordable health insurance coverage options (one-on-one or small group) and any other assistance provided by a health center assister to facilitate enrollment through the Health Insurance Marketplace, Medicaid/CHIP, or Medicare, such as:

- Understanding health insurance options through one-on-one or other customizable education,
- Creating a user account in the Health Insurance Marketplace,
- Updating an account profile and/or income information,
- Filing an exemption or appeal,
- Understanding Health Insurance Marketplace auto-enrollment notices,
- Submitting an application to/through the Health Insurance Marketplace or directly to the state Medicaid agency (also include as an application submitted),
- Understanding an eligibility determination, and
- Selecting a new or different Health Insurance Marketplace plan.

Health center assisters should report an assist provided for each individual who will benefit from that O/E assistance (i.e., all family members represented by the individual(s) assisted).

### **What are affordable health insurance options? Are these limited to affordable plans in the Health Insurance Marketplace or do these extend to Medicare and any third-party insurance?**

- O/E assists reported in the UDS is not limited to the Health Insurance Marketplace. Health centers may include assists to any medical insurance reported in the UDS Table 4.

### **Can assists provided be reported when assistance is provided through a phone call or email?**

- Yes, as long as the assist provided is consistent with the definition outlined above.

### **How should we report the number of assists provided for an individual who is representing other family members?**

- Health center staff who assist an individual representing other family members should count all the family members represented as part of the total number of assists provided. For example, one individual who is assisted to set up an account and submits an application for herself and four other family members would be reported as 5 assists provided for the 5 applications submitted.

# UDS: UNIFORM DATA SYSTEM

## **Do small group visits count as one assist or is the number based on the number of people in the group?**

- Enrollment assists refer to the individuals being directly assisted (e.g., set up accounts and submitting applications). Count the number of individuals in the group who receive customized assistance.

## **What should not be reported as assists provided?**

- Do not report other social service enrollment (not health insurance related), mailings, brochure distribution, conference calls, large group presentations, public service announcements, or other education and outreach that do not allow for customizable messages to consumers.

## **If someone is not eligible for coverage through the Health Insurance Marketplace, Medicaid, CHIP, or Medicare can that interaction still be reported as an assist provided?**

- Yes. Health centers should report an assist provided even if an individual is determined to be ineligible for insurance through the Health Insurance Marketplace, Medicaid, CHIP, or Medicare.

## **Does the health center need to track the assistance provided by individual trained health center assisters?**

- No. HRSA requires that assistance is tracked at the organization level. HRSA does not require health center assisters to track assistance by name or any other personal identifier.

## **Will O/E assistance be reported for the calendar year or for Oct. 1 – Sept. 30?**

- O/E data is captured in the annual Uniform Data System (UDS) as a calendar year submission.

## **Prior to 2017, O/E data were submitted as a quarterly report, and included more comprehensive data than the UDS report. Is there additional documentation that we need to provide when we report the number of O/E assists in Appendix E?**

- No. The count of assists provided is reported in the UDS to identify health centers' ongoing efforts with outreach and enrollment. The shift from a quarterly submission to the annual UDS submission reduced the reporting burden for health centers, while maintaining HRSA's ability to understand the effort that health centers are supporting with their outreach and enrollment activities. No additional documentation is required when reporting outreach and enrollment assists.