



Outbound Call Campaign (VOTE)

Dell Services Change Order

JEN BULLOCK

Director of Customer Service & Operations

REBEKAH DIAMOND

External Affairs Coordinator

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Objective



The Health Connector will be deploying an outbound call campaign as part of its broader outreach and communication campaign. Today's presentation is focused on sharing additional details of the outbound call campaign, as well as requesting approval to move forward with a contract change order with Dell Services to effectuate the campaign.

Background

The Health Connector is actively engaging in a multi-channel outreach and communications campaign focused on increasing awareness with respect to the changes brought forth by the Affordable Care Act (ACA).

- Key considerations for the campaign:
 - The ACA brings about many advantages to Massachusetts, as well as posing new eligibility and coverage requirements for members
 - Massachusetts seeks to maintain its high coverage rate while also adhering to new federal compliance requirements
 - Upwards of 250,000 individuals, families and small businesses currently covered through the Health Connector must transition to new coverage in order to avoid gaps
 - Outreach & communications channels:
 - Direct mail & e-mail
 - Enrollment assisters
 - Road shows & public education
 - Media campaign
-  *Outbound call campaign*

Call Campaign Overview



We plan to launch a comprehensive outbound call campaign targeting approximately 230,000 current and newly eligible Health Connector members transitioning to new coverage in 2014.

- The campaign will target existing Health Connector enrollees, including Commonwealth Care and Commonwealth Choice members, as well as individuals transitioning from other programs (e.g., Insurance Partnership, Medical Security Program, Health Safety Net) and eligible but unenrolled individuals
- The campaign will run for the length of federal open enrollment, October 1, 2013 – March 31, 2014
- Goals of the campaign include:
 - Generate awareness
 - Supplement other outreach efforts
 - Effectuate eligibility determination and enrollment over the phone when possible
- The outbound call campaign will be aggressive, with messaging tailored to varying audiences, prompting quick action to re-apply & enroll

Target Populations

The focus of our outreach efforts expands beyond current Health Connector enrollees and includes both subsidized and non-subsidized populations.

| Subsidized Populations | Description | Coverage End Date |
|---|---|-------------------|
| Commonwealth Care | Individuals 138% FPL – 300% FPL Aliens with Special Status (AWSS) 0 – 300% FPL <i>(Excludes non-AWSS Individuals 0 – 138% FPL who transition to MassHealth)</i> | December 31, 2013 |
| Eligible/Unenrolled & Health Safety Net (HSN) | Individuals eligible for Commonwealth Care (above 138% FPL & all AWSS) but un-enrolled and/or receiving HSN | N/A |
| Insurance Partnership | Employees of small businesses enrolled in IP | December 31, 2013 |
| Children’s Medical Security Plan (CMSP) | CMSP coverage continues, however, does not meet new Minimum Essential Coverage (MEC) standards | N/A |
| Medical Security Plan (MSP) | MSP offered through the Division of Unemployment Assistance (DUA) | December 31, 2013 |

Target Populations (cont'd)



| Non-Subsidized Populations | Description | Coverage End Date |
|-------------------------------|---|--|
| Commonwealth Choice | Non-group, currently non-subsidized individuals whose coverage ends upon anniversary date up until March 31, 2014 | December 31, 2013 January 31, 2014 February 28, 2014 March 31, 2014 |
| Young Adult Plan (YAP) | YAP members enrolled in Commonwealth Choice | December 31, 2013 |
| Business Express* | Small businesses whose coverage ends upon anniversary date throughout calendar year 2014 | Rolling |

*A subset of Business Express calls will be made by SBSB and are excluded from the scope of this change order recommendation

Call Campaign Features

The call campaign will feature a combination of automated messages and live agent calls to prompt individuals to act.

- The campaign will begin with deployment of a series of automated messages that will offer informative messages for individuals including program closure notification, call to action and contact information. Automated messages will:
 - Recur throughout the campaign
 - Vary based on population and timing, tailored to reflect level of urgency and custom messaging
 - Leave a voicemail if the call is not received by a live person
- Live agent calls will be deployed soon after the first set of automated messages
 - Dedicated outbound agents will go through full Customer Service Representative (CSR) training
 - Outbound CSRs will have the ability to provide guidance on how to apply for coverage, as well as actively assist a person in reapplying and enrolling in coverage live over the phone

Sample Call Campaign Timeline

The call campaign will be broken into sub-efforts, with tailored messaging, recurrence and frequency based upon coverage end dates for target populations. Below is a representative sample of the campaign deployment.

| Legend | | Target Populations | | 2013 | | | | | 2014 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|--------------------|-----|------|-----|-----|-----|-----|------|----|---|---|----|----|----|---|----|----|----|---|----|----|----|---|----|----|----|----|---|----|----|----|--|--|--|--|--|--|
| | | OCT | NOV | DEC | JAN | FEB | MAR | APR | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | 1 | 7 | 14 | 21 | 28 | 4 | 11 | 18 | 25 | 2 | 9 | 16 | 23 | 30 | 6 | 13 | 20 | 27 | 3 | 10 | 17 | 25 | 3 | 10 | 17 | 24 | 31 | 7 | 14 | 21 | 28 | | | | | | |
| 1 Automated Call | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 Live Agent | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 Initial Open Enrollment alert message | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 Repeats 1 message with heightened urgency | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 Connects live agent to member with info on deadlines and telephone enrollment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4 Repeats 3 with heightened urgency and telephone enrollment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 Advises member of consequences of failure to take action, deadlines, methods of enrollment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 Targets members who selected a QHP/QDP but not yet paid a premium | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 7 Targets members determined provisionally eligible for QHP/QDP to provide missing eligibility info. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1A • CommCare/ AWSS • YAP • Non-Group Ind. w/ 12/31 or 1/31 coverage end date | | 1 | 1 | | | | | | | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1B • CMSP • IP • MSP | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2A • Non-Group Ind. w/ 2/28 or 3/31 coverage end date | | | | | | | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2B • HSN • Eligible Unenrolled | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Non-Responsive | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Vendor Engagement



We are working with Dell Services, our Customer Service & Business Operations vendor, to conduct the outbound call campaign.

- As our current Customer Service & Business Operations vendor, Dell will provide both inbound and outbound contact center support for individuals & families enrolling in new ACA-compliant coverage with the addition of the scope of work under this work order
- Using Dell and its subcontractors allows us to realize many operational efficiencies, leveraging contact center implementation work already underway, including but not limited to:
 - Training
 - Documentation standards
 - Call recording retention
 - Service levels & performance expectations
 - Business continuity plans
 - Technology integration & data exchanges

Contract Terms

- The outbound call campaign will be a change order to our master service agreement with Dell Services
- The change order extends from October 1, 2013 to March 31, 2014
- Scope highlights:
 - Professionally voice recorded automated messages
 - Direct live agent calls
 - 100 percent call recording
 - Customer Relationship Management (CRM) tracking & documentation
 - Performance & conversion reporting
 - Conversion expectations for member enrollment
- The change order is a grant-funded activity

Price Details

The Outbound Call Campaign change order has been developed to not only compensate Dell for the work required to conduct an aggressive, expansive campaign but also to create a penalty structure that promotes member enrollment.

- The total value of the change order is: \$4,352,291
- Penalties:
 - We have incorporated a system of penalties in this change order in order to effectuate a timely transition
 - For example, we have a flat penalty for not converting the majority of non-Medicaid eligible Commonwealth Care members by January 1, 2014
 - In addition, we have included a per member penalty based upon failure to convert beyond a minimum threshold of all populations being outreached by the end of open enrollment
 - These penalties are designed to guard against gaps in coverage

Recommendation



Health Connector staff recommends that the Health Connector Board of Directors vote to approve the change order with Dell Services to conduct the outbound call campaign.