



## Tips for Engaging Members in Tailored Care Management

### What is engagement?

As Care Management Agencies (CMAs) and Advanced Medical Homes + (AMH+s) launch Tailored Care Management, care management staff are required to reach out to members to participate in care management. The process of reaching out to members is called “engagement.”

With the Tailored Plan, engagement can be an arduous process. Alliance is providing this document as guidance to CMAs and AMH+s and to offer suggestions for engagement.

### How to engage members

1. DO NOT wait to start creating your engagement plan and workflows.
2. Meet with your team and determine a thoughtful, planned approach to engagement.
  - a. Set goals for 30, 60 and 90 days
  - b. Set goals for each team member doing outreach
  - c. Include training of staff to do outreach in your plan
  - d. Consider your staff skillsets and preferences in your plan
  - e. Consider the role of extenders in engagement
3. As soon as your organization passes the NCQA Readiness Review, begin building relationships with other providers, primary care providers (PCP), hospitals, pharmacies, and community-based organizations – these can be an asset during engagement.
4. Educate your internal staff on care management and how engagement will work – leverage these staff members in your engagement plan (include your on-call staff).

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5. Create workflows for your CM team to use in engagement.
6. Engage your assigned Alliance practice transformation specialist if you need assistance with the plan or workflows
7. Understand your panel's acuity tiering. High acuity tiered members are high cost and high utilizers of the healthcare system.
8. At Tailored Plan launch, there will be specific members of your panel with high needs who will be identified for you by your practice transformation specialist. These members need to be engaged within three weeks.
9. Consider using multiple contact approaches at once:
  - a. Letters to members
  - b. Texts to members
  - c. Phone calls to members
  - d. Face-to-face at home or other settings
10. Use geography to increase efficiency and productivity by clustering members by zip code to try to contact several in the same vicinity.
11. If your agency is providing "other services" to a member, piggyback off those scheduled appointments. Work closely with other programs and services within your organization to identify members and potentially engaging them during their appointments within those programs and services.
12. Consider using different times and days of the week for outreach. Understand that members may be physically located at a different address than the one on file, which may impact the assigned care manager. Plan to have some shifts in assignment.
13. Consider alternative data sources to locate members.
14. Remember: slow and steady wins the race!