



# WACMHC

Washington Association of  
Community & Migrant Health Centers

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*We strengthen and advocate for Washington's  
Community Health Centers as they build healthcare  
access, innovation and value.*

**OUTREACH & ENROLLMENT  
WORKGROUP CONNECTIONS FACE-TO-FACE WORKSHOPS  
Yakima – Sept. 5 & Tacoma – Sept. 6**

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# THANKS TO SPONSORS

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# ENROLLMENT

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Enrollments by CHCs' Navigators & CACs  
Oct. 2013 – Jul. 2018

WAH 865,130

QHP 81,423

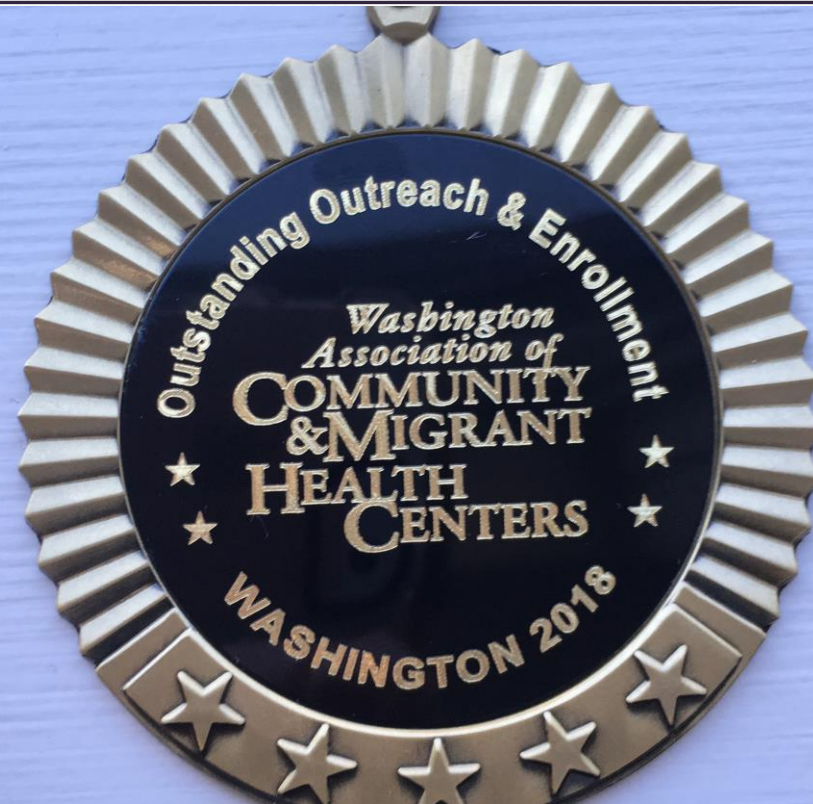
\*\*\* Based on data collected by WA Health  
Benefit Exchange





# CELEBRATING HEALTH CENTERS' ACCOMPLISHMENTS

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# Washington Health Benefit Exchange Navigator Program



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SEPTEMBER 2018

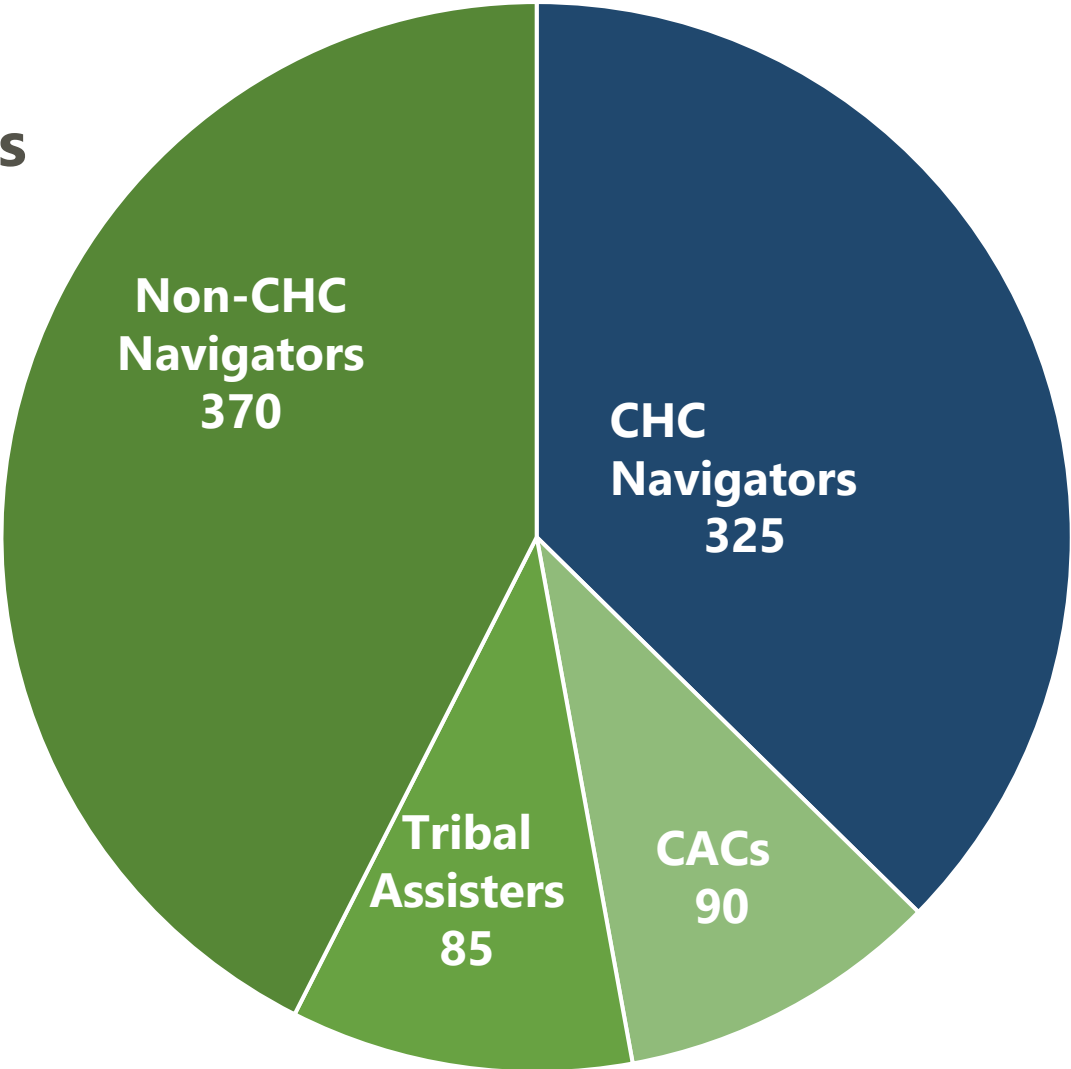


# Agenda

- OE5 Refresher - Results
- Looking Ahead – OE 6
  - Premium Prices
  - Removal of the Mandate
  - Estimates of remaining uninsured in Washington
  - Learning Management System \*New\*
  - OE 6 Features

# Certified Assisters by Type

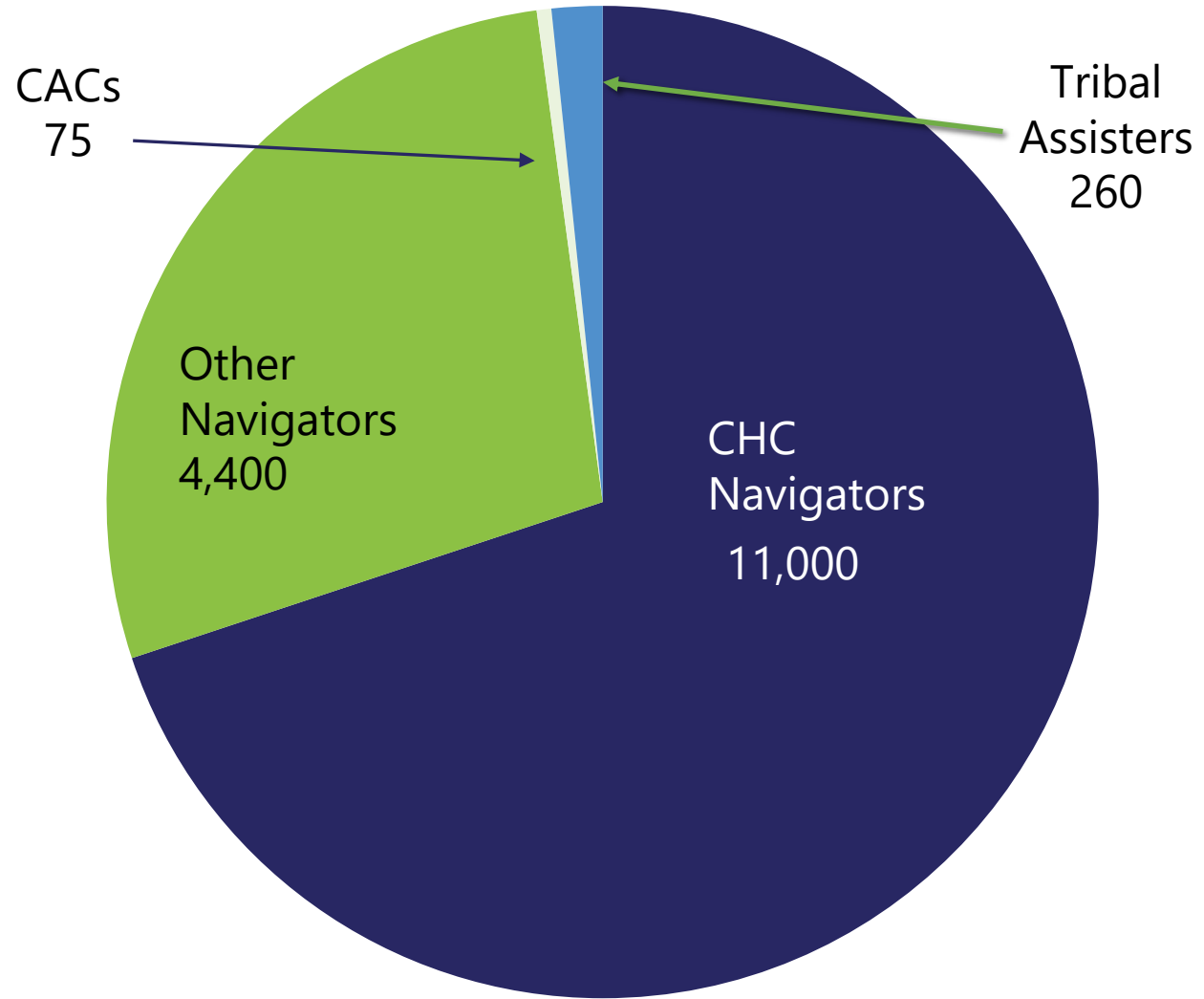
870 Certified Assisters



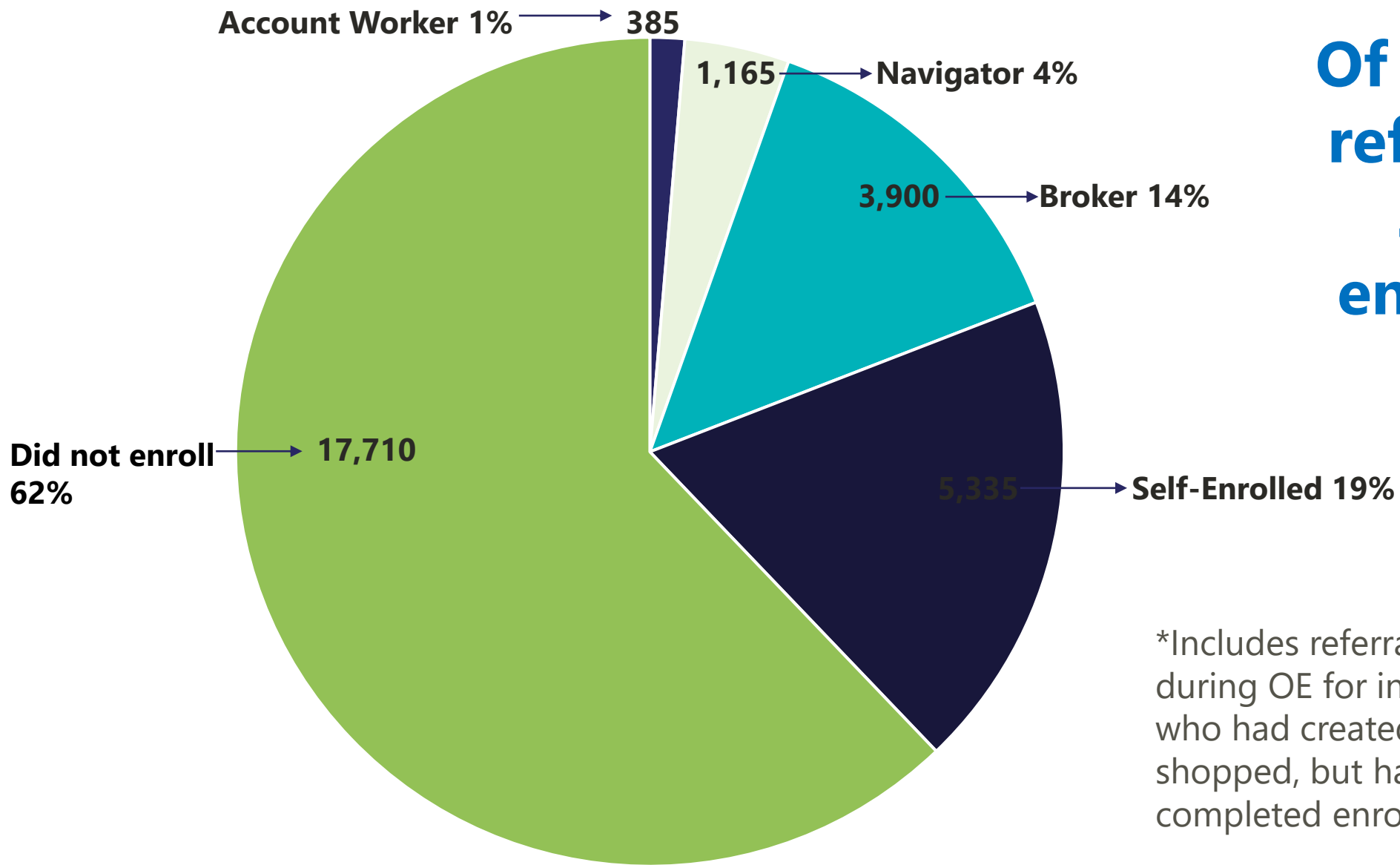


# QHP Enrollments by Assister Type

15,735 QHPs during open enrollment 5



# Following up Leads during OE



**Of 28,360 referrals, 38% enrolled**

\*Includes referrals pulled during OE for individuals who had created accounts or shopped, but had not completed enrollment

# Looking Ahead - Open Enrollment 6



56 days to Open Enrollment!!

# Opportunities & Challenges

Opportunities	Challenges
Renewal Population	No Mandate
Decision Support Tools / 1:1 Assistance	Affordability/ Competing Products
Coordinated communications	Shorter Open Enrollment



# Customer Challenges

- Premiums and deductibles have continued to rise year over year
- Consumers have difficulty understanding cost-sharing and comparing value of plans
- Need to address affordability and value proposition
- Individual market options being discussed by various stakeholders:
  - Public option
  - State individual mandate
  - Premium wraps
  - Standardized plans
  - Surprise billing
  - Reinsurance



# Proposed 2019 Lowest Silver Plan Rates<sup>^</sup>

(40 y/o Individual)

Carrier	2017 Approved Rate	2018 Approved Rate	2019 Proposed Rate	Percent Increase of 2019 Rate over 2018 Rate
BridgeSpan*	\$327	\$492	\$477	-3.04%
Coordinated Care Corp.	\$230	\$328	\$368	12.20%
Kaiser Foundation Health Plan of WA	\$276	\$404	\$480	18.91%
Kaiser Foundation Health Plan of the NW*	\$324	\$435	\$481	10.55%
LifeWise Health Plan of WA*	\$333	\$451	\$483	7.10%
Molina Healthcare of WA	\$253	\$385	\$418	8.50%
Premera Blue Cross	\$406	\$517	\$537	3.95%



<sup>^</sup> Lowest rate for a household of one 40-year-old non-smoker in King Co. (if available)

\* Indicates carrier that is not offering plans in King County; plan rates reflect lowest silver premium in other rating area

Note: Exchange consumers under 400% FPL are eligible for federal premium tax credits, which help shield them from premium increases

# Auto-Renewal

- Customers find auto-renewal process confusing
- Correspondence/dashboard improvements for OE6
  - Improved language (plain talk) and instructions about next steps in notices from Healthplanfinder
  - Customer dashboard will have modals detailing next steps for customers
- Goal is 93% auto-renewal rate (same as last year)
- All customers are encouraged to shop and may change plans through December 15th

# Removal of Individual Mandate

- A lot of speculation on impact
- 2018 saw the biggest enrollment to date
- People who prefer to pay the penalty will likely continue to remain uninsured
- Tax credits will increase for subsidy-eligible individuals
- HBE expecting projections soon
- People want health insurance – affordability and lack of choice may push some out of the market



# Why get health insurance?

- ✓ You may be healthy now, but an accident or illness can result in staggering medical bills
- ✓ You won't have access to preventive care and primary care that would catch health problems early when they are easier and less expensive to treat
- ✓ You may have trouble getting follow-up care needed to fully recover
- ✓ You will have to wait for open enrollment to get coverage – you can't enroll when you get sick or need care



# Estimates of Remaining Uninsured

## QHP-Eligible Age 0-64 in Washington State

	2016	2017	Change
Tax Credit Eligible	151,587	118,849	-22%
Over 400 FPL	43,768	34,068	-22%
Total	195,355	152,917	-22%

*Note: Updated through OE4*



# Top 10 Counties with Remaining Uninsured

County	Tax Credit Eligible	Over 400% FPL	Total
King	23,602	7,203	30,805
Pierce	13,271	4,491	17,762
Snohomish	12,221	4,703	16,924
Yakima	9,088	1,319	10,407
Spokane	6,614	1,802	8,416
Clark	6,323	1,619	7,942
Benton	6,071	1,437	7,508
Kitsap	5,016	1,497	6,513
Grant	4,497	798	5,295
Thurston	3,017	1,425	4,442

# Top 10 Zip Codes with Remaining Uninsured

Zip Code	County		Tax Credit Eligible	Over 400% FPL	Total
99301	Franklin	Pasco	3,234	525	3,759
99336	Benton	Kennewick	2,431	399	2830
98902	Yakima	Yakima	2,222	334	2556
98204	Snohomish	Everett	1,711	357	2068
98901	Yakima	Yakima	1,404	120	1524
98926	Kittitas	Ellensburg	1,377	280	1657
98168	King	Tukwila, Burien, Sea Tac	1,336	274	1,610
98003	King	Federal Way, Auburn	1,290	391	1681
98404	Pierce	Tacoma	1,267	194	1461
98837	Grant	Moses Lake	1,265	490	1,755
98032	King	Kent, Midway	1,260	425	1,685
99362	Walla Walla	Walla Walla	1,197	539	1,736

# New Learning Management System

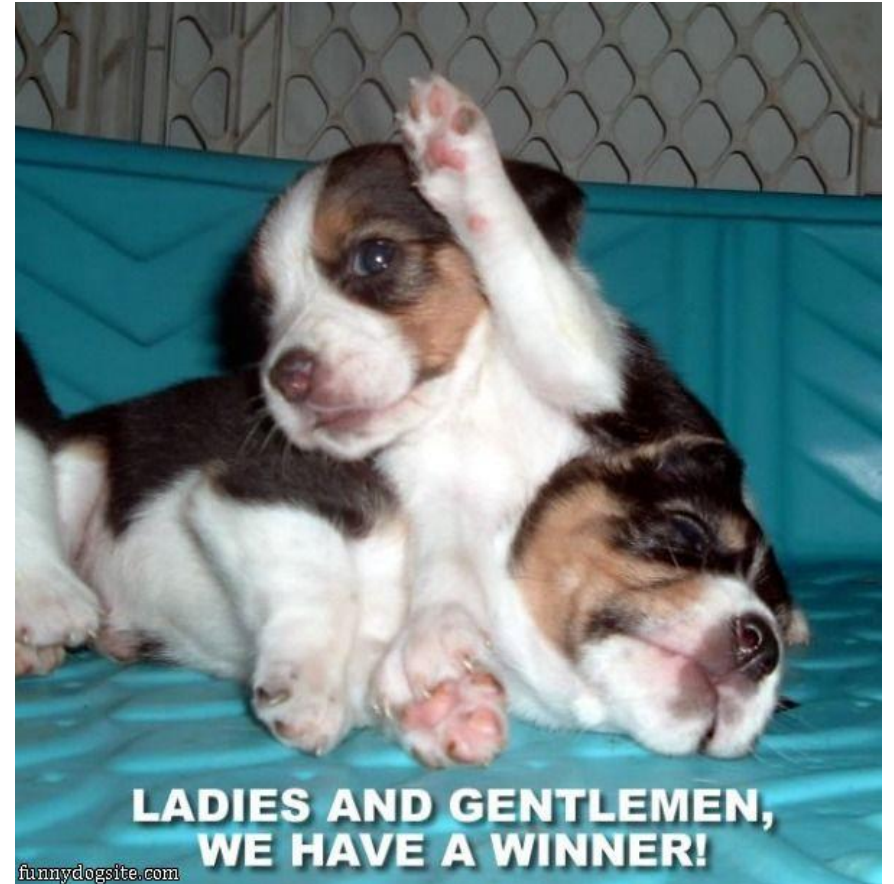
Fall Training begins September 10th – closes October 18th

- Testing
- Navigators will receive a new User Name and Password
- Updated Qualified Health Plan module
  - Tax Credits
  - Cost Sharing Reductions
  - Household Composition
  - Income Reporting.....
- LMS Demo – Sept 6<sup>th</sup>, 9 am



# Open Enrollment 6 Updates

- Customer search
  - ACES ID
  - Without SSN
- Partner to active application
- Mobile or Tablet device – Apply, Report changes, Renew
- Renewal Modal
- Pay Now feature available for all plans
- Timeout warning modal (13-15 min)





Thank you!

[Kelly.Boston@wahbexchange.org](mailto:Kelly.Boston@wahbexchange.org)

[Christine.Brown@wahbexchange.org](mailto:Christine.Brown@wahbexchange.org)





# Face-To-Face Meetings for Health Centers' Navigators

Office of Medicaid Eligibility and Policy (OMEP)  
Medicaid Eligibility and Community Support (MECS)  
September 2018

# Topics

- Health Care Authority (HCA) Updates
- Compact of Free Association (COFA)
- Enrollments & Renewals
- Medicaid Suspension
- Redetermination Workgroup
- WA Apple Health Notices Workgroup
- Share your Story
- Resources

# HCA Updates

# HCA Updates

- Compact of Free Association (COFA)
- Department of Behavioral Health and Recovery (DBHR) integration
- Managed Care Dental
- Managed Care for Foster Care

## DBHR

Governor Jay Inslee has requested legislation to align the state's resources to best support integration of physical and behavioral health services.

As of July, HCA and the Department of Social and Health Services are working toward integrating physical and behavioral health staff and authority at HCA, to better serve Apple Health clients.

After this alignment, HCA will be the state agency owning overall health care policy for the state.

# 2017 Legislative Session

## SSB 5883 Section 213 (1)(c)

Directed Health Care Authority (HCA) to contract through a competitive procurement process with licensed dental health plans or;

- Managed health plans to provide managed dental care services;
- Must contract with 2 plans, if only one is available, fee-for-service will remain.

Contract must include direction to increase dental provider network;

- Commitment to retain innovative programs that improve access and care;
- A program to reduce emergency room use for dental purposes;
- A requirement to ensure that dental care is being coordinated with the PCP for the purposes of integrated care;

# Questions?

- Contact the Managed Care Dental Team at:  
[HCAHCCAMCDentalInfo@hca.wa.gov](mailto:HCAHCCAMCDentalInfo@hca.wa.gov)
- For More Information:  
<https://www.hca.wa.gov/about-hca/apple-health-medicare/apple-health-dental-moving-managed-care>



# Managed Care Foster Care

The 2018 Washington legislature passed substitute house bill 2530 -Foster Youth Reunification- Continuation of Health Care Benefits. This bill became effective July 1<sup>st</sup>, 2018

The bill allows foster children who have returned home to their parents the ability to remain enrolled in Apple Health Care through Coordinated Care of Washington for up to twelve months as long as:

- The family is eligible for Medicaid, and
- The parent requests continued coverage under Core Connections

# **Compact of Free Association (COFA)**

# Background

The Compact of Free Association (COFA) is an economic and military treaty between the United States and the Republic of the Marshall Islands, the Federated States of Micronesia, the Republic of Palau.

Individuals from these nations can come and go freely into the United States and have a non-qualified immigration status. This limits their ability to get federally funded Washington Apple Health (Medicaid) unless they are children or pregnant.

# COFA Nations



# COFA Islander Health Care

To qualify for COFA Islander Health Care, an individual must:

- Be a COFA islander and a Washington resident
- Have countable income under 133% of the federal poverty level (FPL).
- Not be eligible for other minimum essential coverage such as employer sponsor insurance or Medicare
- File taxes, even if it is not required, and qualify for and accept the maximum advanced premium tax credit
- Enroll in a silver level qualified health plan

# Application Process

COFA Islander Health Care begins January 1, 2019.

An individual can submit an application for coverage:

- November 1 through December 15
- Online: [www.wahealthplanfinder.org](http://www.wahealthplanfinder.org)
- Phone: 1-855-923-4633
- Paper Application

An individual may qualify for a special enrollment period for certain life changes. Find a list online at [www.wahbexchange.org/sep](http://www.wahbexchange.org/sep)

# Application and Sponsorship

Individuals enrolled in COFA Islander Health Care will be sponsored by HCA in Washington Healthplanfinder.

As a sponsor, HCA will pay an individual's monthly insurance premiums directly to the carriers.

If an individual enrolled in COFA Islander Health Care receives a bill from the insurance company in the first month they should not pay this bill.



# COFA Islander Health Care

HCA anticipates that there is about 1200-2500 individuals eligible for the program in Washington.

Analysis shows that most populous counties include:

- Spokane
- King
- Clark
- Snohomish
- Pierce
- Thurston
- Cowlitz

# COFA Islander Health Care - Outreach

HCA is hosting a COFA Advisory Committee made up of community members, carriers, advocates, lead organizations, navigators, and state partners. This group is helping advise HCA on making decisions about the implementation of the program.

In September, HCA will launch a culturally and linguistically accessible outreach campaign. This will include outreach materials, videos, social media campaign, and website.

You can check out the website now at: [www.hca.wa.gov/cofa](http://www.hca.wa.gov/cofa)

# Community Workers - Outreach

OMEPA will be hiring 3-6 part time and temporary Community Workers to help individuals apply during open enrollment.

These Community Workers will be members of the COFA Islanders so they can locally connect and assist members of their community with the enrollment process.

# Implementation

## First year impacts

- Manual processing and daily reports
- Sponsorship program to pay for premiums
- Paying for out-of-pocket expenses using sponsorship funds

## Second year outlook

- System support in Washington Healthplanfinder to automatically enroll in COFA Islander Health Care

# Resources

Look for more staff training to come in the future!

Visit our website:

[www.hca.wa.gov/cofa](http://www.hca.wa.gov/cofa)

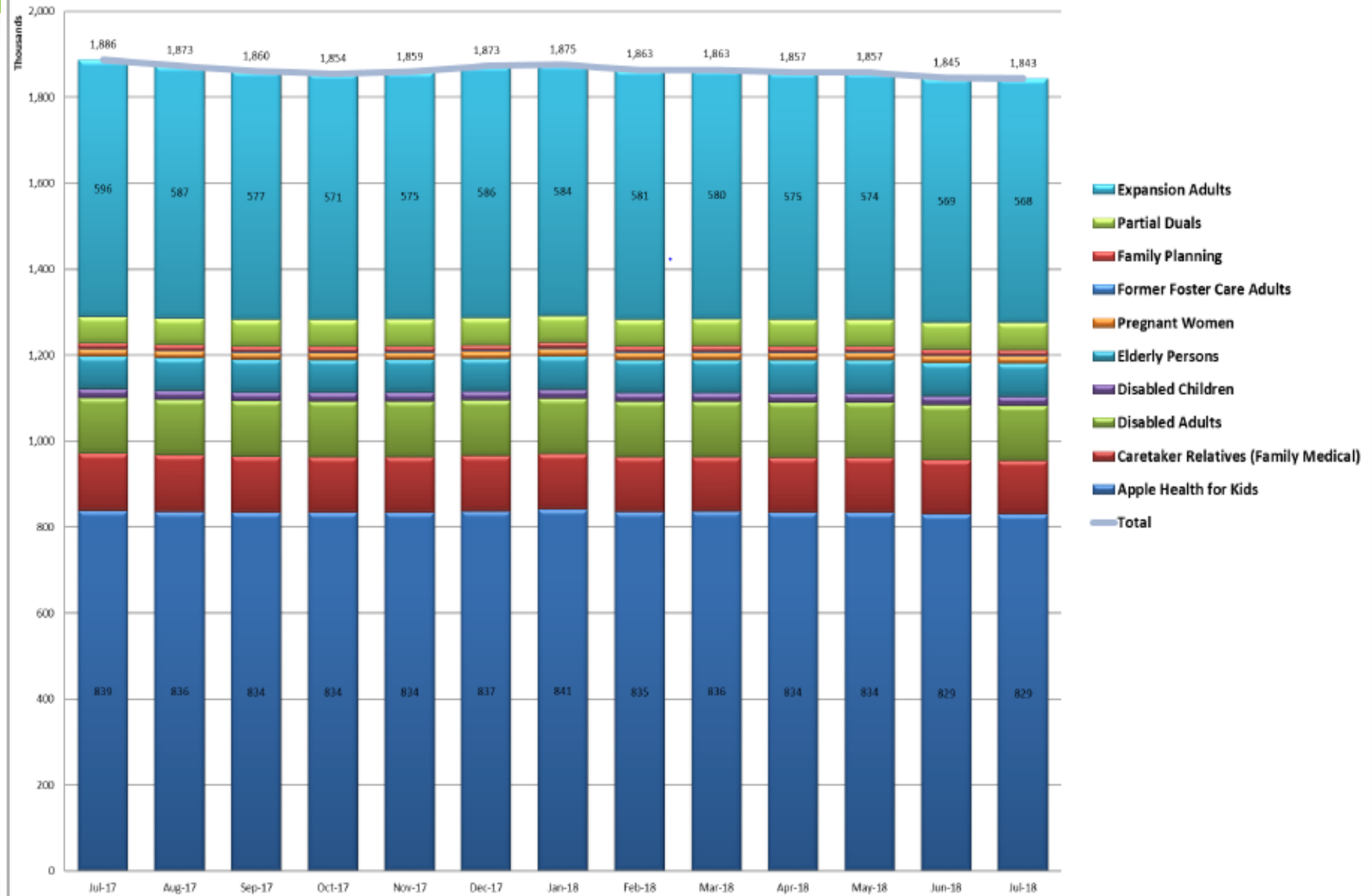
Questions? Email:

[COFAQuestions@hca.wa.gov](mailto:COFAQuestions@hca.wa.gov)

Phone: 1-800-547-3109

# Enrollments & Renewals

Apple Health Enrollment July 2017 through July 2018





# MAGI Renewal Rates

Month	Total Individuals
October 2018	110,632
November 2018	134,591
December 2018	189,759

Auto-renewals remain consistently around 75% each month.

# Medicaid Suspension

# Suspension Overview

The purpose of Medicaid suspension is to provide continuity of care for recipients of Washington Apple Health (Medicaid) during periods of incarceration or commitments in a state hospital by:

- Suspending, not terminating existing coverage
- Applying for health care coverage in suspended status
- Identifying and communicating behavioral health best practices to promote a smooth transition into the community

# Medicaid Suspension Update

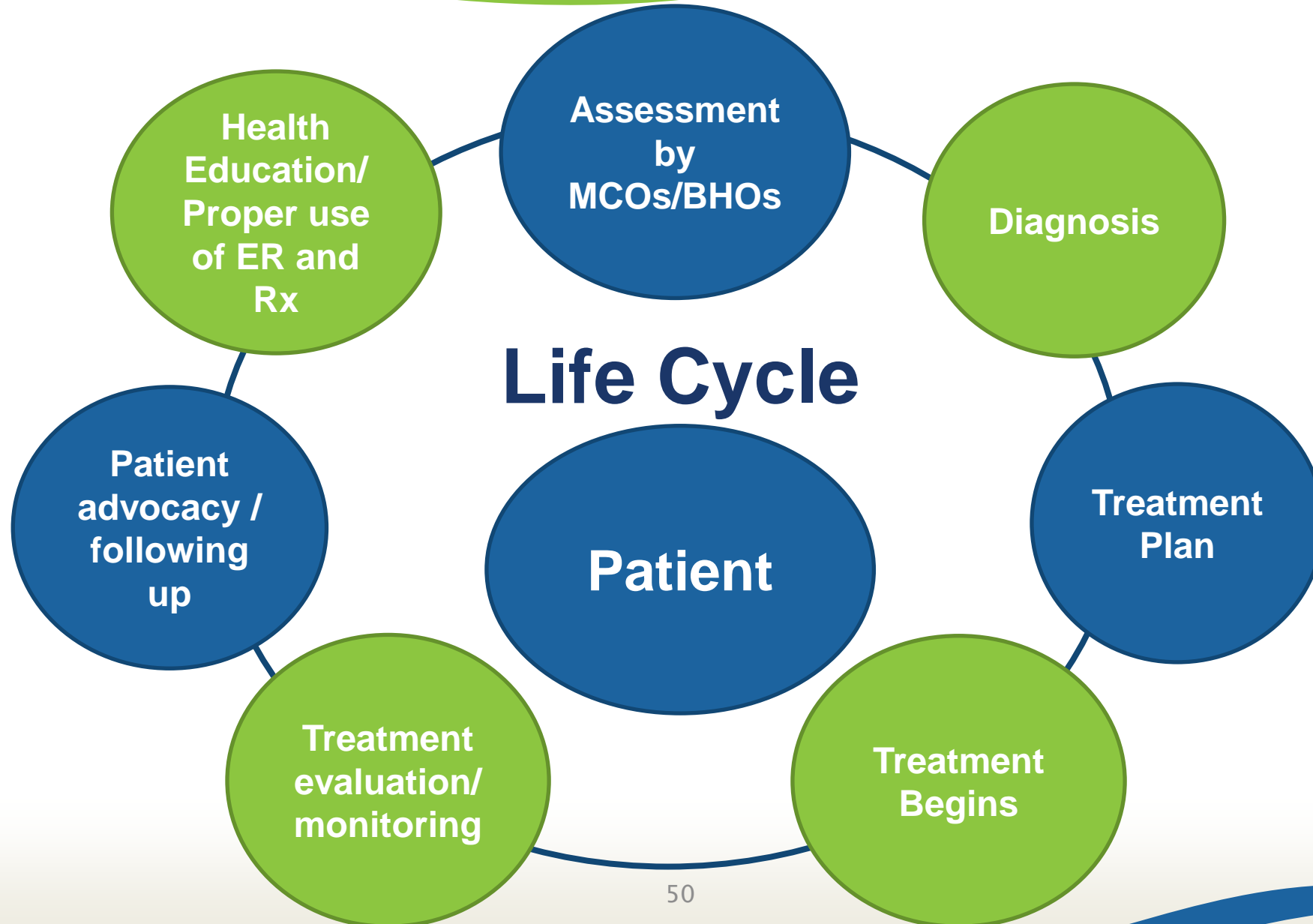
- Through the combined Department of Corrections (DOC) and jail data sources, HCA receives approximately 28,000 files a day.
- HCA has worked through many technical challenges and just implemented a manual suspension process for the DSHS juvenile rehabilitation facilities.

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- Additionally, HCA is currently in the processing of creating and implementing best practice trainings to support care coordination as well as gather guidance from CMS regarding services provided during incarceration.

# Suspension Process

- Each day, facilities update their inmate data. Later that evening the data makes its way into the Jail Booking and Reporting System (JBRS).
- HCA receives this daily data match between JBRS and ProviderOne identifying incarcerated Medicaid beneficiaries.
- HCA modifies the enrollment file in ProviderOne to suspend coverage, and ProviderOne displays the suspended status.
- Daily facilities input release data into JBRS.
- ProviderOne updates the suspension file to restore full Apple Health coverage upon release.



# Challenges

The following are some challenges can occur:

- Not knowing the actual release date of the inmate.
- The individual has additional charges and may end up being transferred to another facility.
- Medicaid does not cover Medical Assistance Treatment (MAT) in jail because they are in an institution.

For additional information about Snohomish County's project, visit: <https://snohomishcountywa.gov/3687/About-the-Opioid-Project>



# Next Steps

HCA is finalizing the training modules. These include information on:

- Procedures to handle situations such as facilitating Medicaid enrollment, funding opportunities for jails, and care coordination.
- Develop tools and share best practices to communicate incarceration status and coverage for care coordination purposes.
- Continue to refine workflow processes and opportunities to streamline operations.
- Continue to work with vendor to improve jail reporting functionality.

# Training Modules

The three part training will benefit those who work with justice involved individuals who assist with Medicaid enrollment and care coordination.

Part 1: **Suspension 101 Enrollment Training**, posted on our [Medicaid Suspension](#) webpage;

Part 2: **Funding** has been added to our suspension webpage;

Part 3: **Care Coordination** to be completed by the end of August, and will be added to our webpage shortly after.

# Contact Us

Do you have  
questions or  
would you like to  
get involved?

HCA Medicaid Suspension  
[Medicaidsuspension@hca.wa.gov](mailto:Medicaidsuspension@hca.wa.gov)

Visit the Medicaid Suspension  
[Webpage](#)



# Redetermination Workgroup

# Redetermination Workgroup

HCA is working with advocates, community partners, DSHS, OIC and HBE to improve the redetermination process when individuals turn age 65 and lose their Washington Apple Health for Adults and transition into other available coverage depending on their circumstances.

The workgroup is exploring new communication efforts to reach this population and help them understand their coverage options for the future.

# **WA Apple Health Notices Workgroup**

# Notices Workgroup

The Notices Workgroup that includes consumers, advocates, and agency representatives continues to collaborate on improving Apple Health notices in Washington Healthplanfinder.

If you know of any consumers wanting to participate in our workgroup please contact Maggie:  
[Margaret.Clay@hca.wa.gov](mailto:Margaret.Clay@hca.wa.gov)

**Share Your Story**



# Share your story!

We are looking for people in Washington whose lives have changed for the better because they have Apple Health coverage.

With the individual's permission, their testimonials could be featured on the Washington Healthplanfinder, Health Benefit Exchange, or Health Care Authority websites and printed materials.

If we do use their story, they can get a \$50 gift card!

# Share your story!

For more information, please visit: <https://www.hca.wa.gov/about-hca/apple-health-medicaid/share-your-apple-health-story>



"I can't begin to explain how much Apple Health as helped me." Shylo Williamson, Davenport.

"I wouldn't be able to afford health insurance otherwise." Sacha Bliese, Bellingham.



# Resources

## Cross Agency Desk Aid

Referral Communications Committee - Last Updated 8/1/2018

Department of Social and Health Services			Health Benefit Exchange		Health Care Authority		
Community Services Division Customer Service Contact Center	Development Disabilities Administration (DDA) Long-Term Care Specialty Unit	Aging and Long-Term Support Administration (Long-Term Care)		Washington Healthplanfinder Customer Support Center	Lead Organizations Navigators	Medical Assistance Customer Service Center (MACSC)	Medical Eligibility Determination Services (MEDS)
		Home & Community Services (HCS)	Residential Care Services (RCS)				
1-877-501-2233 1-877-980-9220 (Answer Phone) Apply here: <a href="http://www.washingtonconnection.org">www.washingtonconnection.org</a> 1-888-338-7410 (FAX)	1-855-873-0642 Apply for Specialty Unit programs: <a href="http://www.washingtonconnection.org">www.washingtonconnection.org</a> 1-855-635-8305 (FAX)	Find your local HCS office: <a href="http://adswweb.dshs.wa.gov/hosm.asp.htm">http://adswweb.dshs.wa.gov/hosm.asp.htm</a> Apply for HCS programs: <a href="http://www.washingtonconnection.org">www.washingtonconnection.org</a> 1-855-635-8305 (FAX)	Report abuse or neglect in a licensed/certified setting: 1-800-562-6078 <a href="http://www.dshs.wa.gov/eltse/repofadulthood">www.dshs.wa.gov/eltse/repofadulthood</a>	1-855-923-4633 <a href="http://www.wahealthplanfinder.org/customer-support@wabexchange.org">http://www.wahealthplanfinder.org/customer-support@wabexchange.org</a> 1-360-841-7620 (FAX)	Lead Organization Contact Information available at: <a href="https://www.wahbexchange.org/partners/navigators/">https://www.wahbexchange.org/partners/navigators/</a>	1-800-562-3022 <a href="https://forbes.wa.gov/hos/contactus/">https://forbes.wa.gov/hos/contactus/</a>	1-800-562-3022 <a href="https://forbes.wa.gov/hos/contactus/ContactUs.aspx">https://forbes.wa.gov/hos/contactus/ContactUs.aspx</a>
<ul style="list-style-type: none"> <li>Apply for, report changes or renew Food, Cash, and Child Care programs (SNAP, EBT, ABD/ HEN Referral, TANF/WorkFirst, Refugee Assistance)</li> <li>Apply for Classic Medicaid programs, SSI, 65+, and disabled</li> <li>Request an appeal of Classic Medicaid, Food, Cash and Child Care programs</li> <li>WASHCAP (Food for households whose only income is SSI or combination of SSI/SSA) 1-877-380-5784</li> <li>For additional application assistance refer to the Public Access Directory for community partners: <a href="https://www.washingtonconnection.org/home/publicaccessdirectory.aspx">https://www.washingtonconnection.org/home/publicaccessdirectory.aspx</a></li> <li>Constituent Relations 1-800-865-7801</li> </ul>	<p>The Specialty Unit manages Medicaid programs for clients living in a variety of settings, receiving:</p> <ul style="list-style-type: none"> <li>DDA services                             <ul style="list-style-type: none"> <li>Waiver service programs</li> <li>Community First Choice (CFC)</li> <li>Medicaid Personal Care (MPC)</li> <li>Roads to Community Living (RCL)</li> </ul> </li> <li>Hospice medical</li> <li>Healthcare for Workers with Disabilities (HWD/S08) 1-800-871-9275</li> <li>Residential mental health services</li> <li>Associated cash (no TANF) and food assistance (except for children)</li> </ul> <p>Service Referral &amp; Information Request Form <a href="https://www.dshs.wa.gov/dsa/service-and-information-request">https://www.dshs.wa.gov/dsa/service-and-information-request</a></p>	<p>HCS processes the following Medicaid programs:</p> <ul style="list-style-type: none"> <li>Nursing facility services</li> <li>LTC services for community settings:                             <ul style="list-style-type: none"> <li>In-home care</li> <li>assisted living</li> <li>adult family home</li> </ul> </li> <li>HCS Waiver services:                             <ul style="list-style-type: none"> <li>Community First Choice (CFC)</li> <li>Medicaid Personal Care (MPC)</li> <li>COPEs</li> <li>PACE</li> <li>Roads to Community Living (RCL)</li> <li>TSOA</li> <li>MAC</li> </ul> </li> <li>Associated cash and food benefits for HCS clients (except for TANF/Food)</li> </ul> <p>Request an appeal for HCS programs</p> <p>Adult Protective Services (APS):</p> <ul style="list-style-type: none"> <li>Report abuse or neglect at: <a href="http://www.dshs.wa.gov/eltse/repofadulthood">www.dshs.wa.gov/eltse/repofadulthood</a></li> </ul>	<p>RCS is responsible for the licensing/certification and oversight of the following:</p> <ul style="list-style-type: none"> <li>Nursing facilities</li> <li>Adult family homes</li> <li>Assisted living facilities</li> <li>Intermediate care for individuals with intellectual disabilities</li> <li>Enhanced services facilities</li> <li>Certified community residential services &amp; supports</li> </ul> <p>To search for a licensed home in your area, visit <a href="https://www.dshs.wa.gov/eltse/residential-care-services/residential-care-services">https://www.dshs.wa.gov/eltse/residential-care-services/residential-care-services</a>, select the setting and then the locator link.</p> <p>To find an RCS office near you, visit <a href="https://www.dshs.wa.gov/eltse/services/residential-care-services/offices">https://www.dshs.wa.gov/eltse/services/residential-care-services/offices</a></p>	<ul style="list-style-type: none"> <li>Apply for or renew health care coverage (families, children, pregnant women and single adults)</li> <li>Health Insurance Premium Tax Credit (HIPTC) questions</li> <li>Qualified Health and Dental Plans (QHP/QDP) questions</li> <li>Healthplanfinder Business questions</li> <li>Locate an HBE Navigator or Broker <a href="http://ContactUs.WashingtonHealthBenefitExchange-WashingtonHealthBenefitExchange">Contact Us   Washington Health Benefit Exchange - Washington Health Benefit Exchange</a></li> <li>Request an appeal for denial of HIPTC/QHP, Special Enrollment: <a href="http://www.wahbexchange.org/appeals">www.wahbexchange.org/appeals</a> or call for information: 1-855-859-2512</li> </ul>	<p>For planned maintenance and outages, visit <a href="http://Healthplanfinder.Status.Center">Healthplanfinder Status Center</a>: <a href="http://Outages.Maintenance.WashingtonHealthBenefitExchange-WashingtonHealthBenefitExchange">Outages &amp; Maintenance   Washington Health Benefit Exchange - Washington Health Benefit Exchange</a></p> <p>Email <a href="mailto:navigator@wabexchange.org">navigator@wabexchange.org</a></p> <ul style="list-style-type: none"> <li>For questions about becoming a Navigator</li> <li>To request outreach materials and presentations</li> </ul>	<ul style="list-style-type: none"> <li>ProviderOne Client Services Card</li> <li>Provider billing and claims questions</li> <li>Apple Health Managed Care enrollment and questions</li> <li>Apple Health benefit coverage questions.</li> <li>In the Southwest &amp; North Central Regions Only: Mental Health, Substance Use Disorder and Crisis Services                             <ul style="list-style-type: none"> <li>Additional Supports <a href="http://www.hca.wa.gov/healthplanfinder/individuals-families/">http://www.hca.wa.gov/healthplanfinder/individuals-families/</a></li> </ul> </li> <li>Grant, Douglas and Chelan Counties                             <ul style="list-style-type: none"> <li>24/hr. Crisis Line: 800-852-2023</li> </ul> </li> <li>Clerk and Skamania Counties                             <ul style="list-style-type: none"> <li>24/hr. Crisis Line: 800-826-8137</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Apple Health Modified Adjusted Gross Income (MAGI) Medicaid eligibility questions (families, children, pregnant women and single adults)</li> <li>Post-Eligibility Case Review questions or report changes</li> <li>Apple Health for Kids premium payment questions (CHIP)</li> <li>Request an appeal for Apple Health Programs</li> </ul>
Hours of operation: 8:00 am – 5:00 pm, Monday – Friday (except state holidays). Interview hours: 8:00 am – 3:00 pm Suggested script: "Please have your Client ID or Social Security Number available."	Hours of operation: 8:00 am – 5:00 pm, Monday – Friday (except state holidays). closed from Noon – 1pm Suggested script: "Please have your Client ID or Social Security Number available."	Request an appeal for HCS programs Adult Protective Services (APS): Report abuse or neglect at: <a href="http://www.dshs.wa.gov/eltse/repofadulthood">www.dshs.wa.gov/eltse/repofadulthood</a>	To find an RCS office near you, visit <a href="https://www.dshs.wa.gov/eltse/services/residential-care-services/offices">https://www.dshs.wa.gov/eltse/services/residential-care-services/offices</a>	Hours of operation: Mon – Fri 7:30 am – 6:30 pm (except state holidays). During other hours, visit <a href="http://ContactUs.WashingtonHealthBenefitExchange-WashingtonHealthBenefitExchange">Contact Us   Washington Health Benefit Exchange - Washington Health Benefit Exchange</a> Suggested script: "Please have your HBE application ID or Social Security Number available."	Hours of operation are generally 8:00 am – 5:00 pm, Monday – Friday (except holidays). Suggested script: "For application issues, please have the HPE application ID available."	Hours of operation: 7:00 am – 5:00 pm, Monday - Friday (except state holidays). Suggested script: "Please have your Client ID or ProviderOne ID available."	Hours of operation: 8:00 am – 5:00 pm Monday - Friday (except state holidays). Suggested script: "Please have your Application ID, Client ID or Social Security Number available."



[http://www.hca.wa.gov/assets/free-or-low-cost/customer-support-center\\_referrals.pdf](http://www.hca.wa.gov/assets/free-or-low-cost/customer-support-center_referrals.pdf)

# Resources

## **HCA Training & Education Resources**

<http://www.hca.wa.gov/free-or-low-cost-health-care/apple-health-medicaid-coverage/stakeholder-training-and-education>

## **HCA Community-Based Specialists**

[http://www.hca.wa.gov/assets/free-or-low-cost/community\\_based\\_staff\\_contact.pdf](http://www.hca.wa.gov/assets/free-or-low-cost/community_based_staff_contact.pdf)

## **HCA Area Representative**

[http://www.hca.wa.gov/assets/free-or-low-cost/area\\_representatives.pdf](http://www.hca.wa.gov/assets/free-or-low-cost/area_representatives.pdf)

# Questions

# **PEER NETWORKING: O & E Best Practices for Health Centers**

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**Discuss:**

**What are your most successful in-reach and out-reach activities? What works best with the populations you serve?**





# Tax Update for HPF Navigators

Volunteer Income Tax Assistance (VITA) [www.irs.gov/vita](http://www.irs.gov/vita)

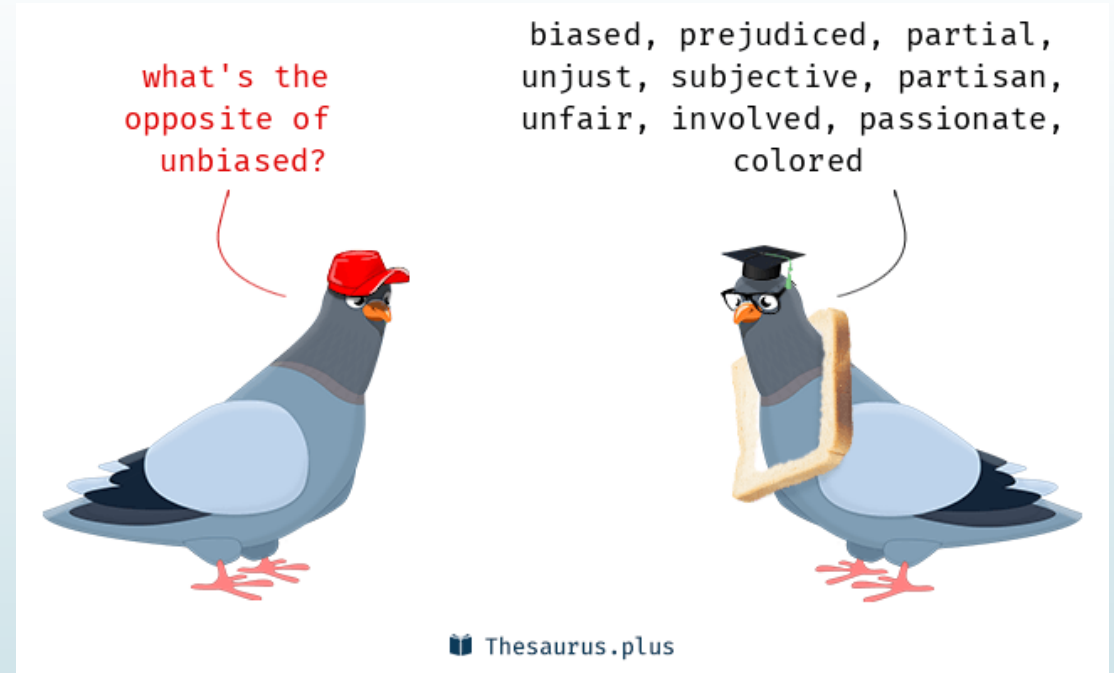
Heather Little

Sound Outreach, Tacoma, WA



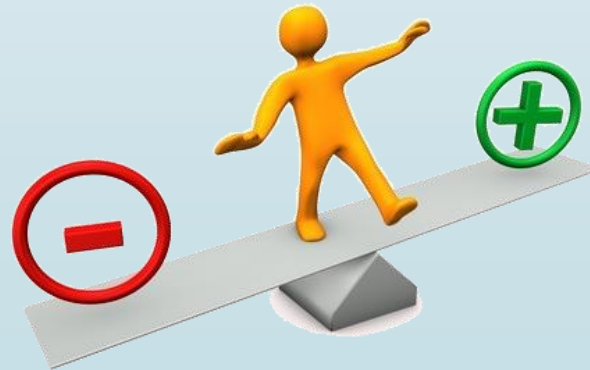
# What can we learn today?

- **A basic understanding**
- **IRS ITA**
- **Form 1040 read tips**
- **Explaining ACA tax credits**
- **VITA Resource**



# A BASIC UNDERSTANDING

- Why does.....
  - Filing Status matter?
  - Or Dependents?
  - Or Business Deductions?
  - Or Lump sum / year end income? Etc. Etc.



**The Sliding  
Scale**



# IRS's Interactive Tax Assistant (ITA)

[www.irs.gov/ita](http://www.irs.gov/ita)

The Interactive Tax Assistant (ITA) is a tool that provides answers to a number of tax law questions. It can determine if a type of income is taxable, if you're eligible to claim certain credits, and if you can deduct expenses on your tax return. It also provides answers for general questions, such as determining your filing status, if you can claim dependents, if you have to file a tax return, etc.

# What about Self-Employment Income, Deductions and what's reported?

## **Beyond your scope so use your resources!**

- ✓ Current business ledger or profit / loss statement
- ✓ Past Years Tax Return
- ✓ Clients organized personal system

It is the Business owners responsibility to know the tax laws and keep records for their businesses income and deductions. The IRS has many resources to assist clients in creating their own accurate income estimate.

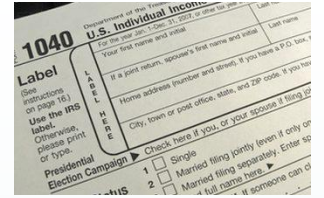
- ✓ <https://www.irs.gov/businesses>
  - Small Business and Self-Employed Tax Center
- ✓ <https://www.irs.gov/pub/irs-pdf/p4591.pdf> (available to order free on irs.gov for those clients who are not internet friendly, use search box)

# The New Form 1040



The new 1040 – about half the size of the current version -- would replace the current Form 1040 as well as the Form 1040A and the Form 1040EZ. The IRS circulated a copy of the new form and will work with the tax community to finalize the streamlined Form 1040 over the summer.

<b>Form 1040</b>	Department of the Treasury—Internal Revenue Service	(99)	<b>2018</b>	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.
Filing status: <input type="checkbox"/> Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately <input type="checkbox"/> Head of household <input type="checkbox"/> Qualifying widow(er)					
Your first name and initial		Last name		Your social security number	
Your standard deduction: <input type="checkbox"/> Someone can claim you as a dependent <input type="checkbox"/> You were born before January 2, 1954 <input type="checkbox"/> You are blind					
If joint return, spouse's first name and initial		Last name		Spouse's social security number	

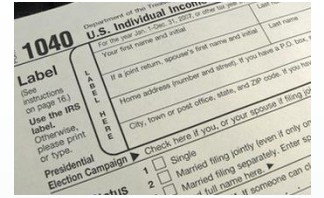
# 2017 Form 1040- for HPF Navigators



## 1040 & 1040A: page 1

- **Label Section:**  Primary taxpayers PII
- **Filing Status:**  Single  Married Filing Jointly, etc.
- **Exemptions:**  Any Dependents claimed on return

# 2017 Form 1040- for HPF Navigators



**1040 & 1040A: page 1  
continued**

- **All Income;** wages, unemployment, business net income, SSA, etc. etc.

\_\_\_\_\_

- **Adjustments;** student loan interest, alimony paid, Health Savings Account, etc. etc.

=====

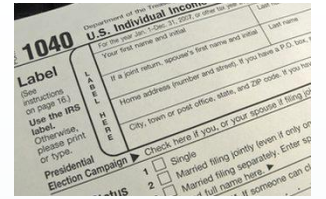
**AGI**

Adjusted Gross Income

# 2017 Form 1040- for HPF Navigators

## 1040 & 1040A: page 2

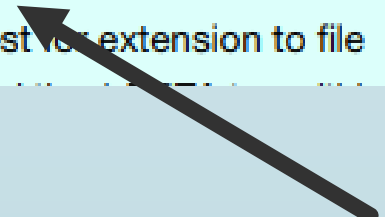
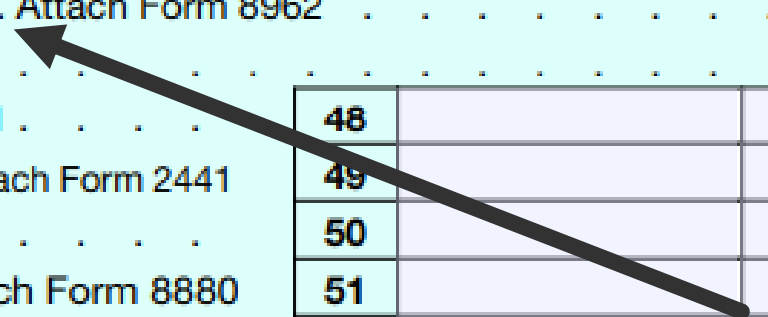
- **Excess APTC repayment**
  - Form 1040 line 46
  - Form 1040A line 29
- **Non-Refundable Credits;** *Child care, retirement savings, education credits, etc. etc.*
  - Form 1040 lines 48 - 54
  - Form 1040A lines 31 - 35
- **Payments and Refundable Credits;** Federal withholding, EITC, education credits, **Excess “net” PTC**, etc. etc.
  - Form 1040 lines 64 – 74 (**69**)
  - Form 1040A lines 40 – 45 (**45**)





<b>46</b>	Excess advance premium tax credit repayment. Attach Form 8962 . . . . .				<b>46</b>	
<b>47</b>	Add lines 44, 45, and 46 . . . . .				<b>47</b>	
<b>48</b>	Foreign tax credit. Attach Form 1116 if required . . . . .	<b>48</b>				
<b>49</b>	Credit for child and dependent care expenses. Attach Form 2441 . . . . .	<b>49</b>				
<b>50</b>	Education credits from Form 8863, line 19 . . . . .	<b>50</b>				
<b>51</b>	Retirement savings contributions credit. Attach Form 8880 . . . . .	<b>51</b>				
<b>52</b>	Child tax credit. Attach Schedule 8812, if required . . . . .	<b>52</b>				
<b>53</b>	Residential energy credits. Attach Form 5695 . . . . .	<b>53</b>				
<b>54</b>	Other credits from Form: <b>a</b> <input type="checkbox"/> 3800 <b>b</b> <input type="checkbox"/> 8801 <b>c</b> <input type="checkbox"/> _____	<b>54</b>				

<b>64</b>	Federal income tax withheld from Forms W-2 and 1099 . . . . .	<b>64</b>			
<b>65</b>	2017 estimated tax payments and amount applied from 2016 return . . . . .	<b>65</b>			
<b>66a</b>	<b>Earned income credit (EIC)</b> . . . . .	<b>66a</b>			
<b>b</b>	Nontaxable combat pay election <b>66b</b> _____				
<b>67</b>	Additional child tax credit. Attach Schedule 8812 . . . . .	<b>67</b>			
<b>68</b>	American opportunity credit from Form 8863, line 8 . . . . .	<b>68</b>			
<b>69</b>	Net premium tax credit. Attach Form 8962 . . . . .	<b>69</b>			
<b>70</b>	Amount paid with request for extension to file . . . . .	<b>70</b>			



# Explaining ACA tax credits

## □ Explain PTC

➤ Be Clear

➤ Keep it Simple, use plain descriptions

- The Premium Tax Credit is *estimated* based on what you *estimate* will be included in your *annual* tax return
- When you file your annual tax return if it does not closely match your HPF application *estimation* then your PTC may be different.
  - This is called Reconciling the Credit (making it true)
  - If you got too much you may have to pay some back
  - If you got too little you may get a PTC net refund

# Explaining ACA tax credits

## □ Explain APTC

➤ Be Clear

➤ Keep it Simple, use plain descriptions

- You can use some or all of your PTC to lower your monthly premium payments or wait to get all of your tax credit when you file your tax return.
- If you use part or all of your PTC to lower your monthly premium payment then you are taking the PTC in advance. This means you will have already used in advance the designated portion of your PTC.
- If your income estimate was incorrect and your PTC changes you will already have received these *advanced payments*

# Explaining ACA tax credits

- ❑ Give more detailed information for the person to go over later in the form of a handout or guide.
  - ✓ [www.wahbexchange.org/partners/partners-toolkit](http://www.wahbexchange.org/partners/partners-toolkit)
  - ✓ [www.irs.gov/affordable-care-act](http://www.irs.gov/affordable-care-act)
  - ✓ [www.irs.gov/pub/irs-pdf/p5120.pdf](http://www.irs.gov/pub/irs-pdf/p5120.pdf)
  - ✓ [www.irs.gov/pub/irs-pdf/p5152.pdf](http://www.irs.gov/pub/irs-pdf/p5152.pdf)



## In Summary.....

- ❑ Accurate estimated Tax return information is important!
- ❑ To assist a client in an accurate estimation use tools like
  - ✓ The IRS Interactive Tax Assistant [www.irs.gov/ita](http://www.irs.gov/ita)
  - ✓ Previous years 1040 as a reference keeping in mind circumstances may have changed
  - ✓ Business owners have a responsibility to keep accurate records, you can only suggest resources.
- ❑ Be Clear and use simple language to explain the Premium Tax Credit and what it means to take this credit in advance.



# Volunteer Income Tax Assistance (VITA)

The Volunteer Income Tax Assistance (VITA) program offers free tax help to people who generally make \$54,000 or less, persons with disabilities and limited English speaking taxpayers who need assistance in preparing their own tax returns. **IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals.**

[WWW.IRS.GOV/VITA](http://WWW.IRS.GOV/VITA)

**VITA at Sound Outreach: 253-719-3700**

**Heather@soundoutreach.org**

# Medical Assistance for Non-Citizens in Washington State

September 5, 2018

Michele Besso  
Northwest Justice Project  
(509) 574-4234  
MicheleB@nwjustice.org

# Medical Assistance for Non-Citizens in Washington State

September 6, 2018

Kate Laner  
Northwest Justice Project  
888-201-1012  
[katel@nwjustice.org](mailto:katel@nwjustice.org)



# Topics Covered

- Who is eligible for what?
- Barriers
- Public Charge - potential risks of applying for or receiving benefits

# Different Types of Immigration Status

## Some Usually Lead to Permanent Status

Asylee, refugee, family or employment visa petition, VAWA self-petition, diversity visa, U visa, T visa, cancellation of removal, etc.



Adjustment to Lawful Permanent Resident (“greencard”) Status



Naturalization

## Others May or May not Lead to Permanent Status

Deferred Action

Public Interest Parole

Temporary Protected Status

Non-immigrants visas  
(student visas, tourists, etc.)



# 1996 Welfare Reform and Immigrants

## “Qualified v. Non-Qualified”

“Qualified”:

- \* Lawful Permanent Residents (greencard holders)
- Refugees, persons granted asylum or withholding of deportation/removal, conditional entrants
- Granted parole for at least one year
- Cuban and Haitian entrants
- Certain abused immigrants, their children and/or parents
- Certain Victims of Trafficking

“Non-Qualified”: Everyone else.

- Entered prior to 8/22/1996 v. entered after

# 5 Year Bar

Most immigrants barred from receiving federal “means tested public benefits” – including Medicaid - for their first 5 years in “qualified” status.

# 5 Year Bar

Some categories exempt from 5 year bar:

- Refugees, asylees, persons granted withholding, Amerasian immigrants, Cuban/Haitian entrants
- Veterans, active duty military (includes spouses, unremarried surviving spouses, children)
- Victims of trafficking

No 5 year bar

- emergency Medicaid, “Alien Medical” programs
- children’s/pregnant women’s medical

# Sponsor Deeming

- Illegal Immigration Reform and Immigrant Responsibility Act of 1996 created new legally enforceable “Affidavit of Support” (form I-864)
- Sponsor’s income considered when person applies for benefits
- Primarily applies to persons immigrating through a family visa (some employment as well)
- Does **not** apply to humanitarian entrants

# Sponsor Deeming

- Government *may* try to recover benefits from sponsor (but this has been rare)
- For federal benefits, sponsor deeming continues until the immigrant has 40 quarters of work history or naturalizes, or the sponsor dies
- For WA state benefits, sponsor deeming ends 5 years after the immigrant gets status

# Sponsor Deeming

- Exemptions include:
  - Can be credited with 40 quarters work history
  - Sponsor is dead
  - Recipient is victim of DV by sponsor
  - Assistance unit is at or below 130% federal poverty level
- NO sponsor deeming when calculating an immigrant's income eligibility for tax credits/subsidies under the ACA.



# Immigrant Eligibility for Medical

US Citizens and  
Nationals

“Lawfully Present” immigrants  
Qualified Non-Qualified

Immigrants not Lawfully  
Present

# Medical Assistance Available to Immigrants Not Lawfully Present

- State-funded pregnancy and children's medical
- Emergency Medicaid
- "Alien Medical" Programs (cancer treatment, dialysis, long term care)
- Charity Care for hospital treatment
- Community clinics
- Immunizations
- Testing and treatment of communicable diseases

# Lawfully Present Immigrants

## “Qualified” include:

Lawful Permanent Residents

Refugees, persons granted asylum or withholding of deportation/removal, conditional entrants

Granted parole for at least one year

Cuban and Haitian entrants

Certain abused immigrants, their children and/or parents

Certain Victims of Trafficking

## “Non-qualified” include:

- many immigration applicants (asylum or withholding, Special Immigrant Juvenile Status, T visas, adjustment w/approved I-130)
- persons in temporary status including non-immigrants, TPS, granted deferred action (but note: DACA excluded from federal coverage)
- citizens of Micronesia, Palau, Marshall Islands

## **Medical Assistance Available to Immigrants Lawfully Present but Non-Qualified**

All of those available to not lawfully present,  
plus:

- Qualified Health Plans and subsidies/tax credits
- Medical Care Services (MCS)

# Medical Assistance Available to Qualified Immigrants

All of those available to Non-Qualified  
Lawfully Present, plus

*After 5 year bar (or exempt):*

- Medicaid (non-emergency)
- Refugee cash and medical (for refugees, asylees, humanitarian entrants)

# US citizens, nationals, and others treated like citizens

Includes citizens by birth or naturalization

Includes citizen children of undocumented parents

Includes certain American Indians born outside the U.S.

Nationals: persons born in American Samoa or Swains Island after 12/24/1952 and residents of the Northern Mariana Islands who did not elect to become US citizens

# Verification of Immigration Status

- The Systematic Alien Verification for Entitlement (SAVE) statute provides procedures for verifying immigrant eligibility for Medicaid and other programs
- Guidance directs agencies to seek information only about the person applying for benefits and not other family members

# Verification of Immigration Status

- Programs using SAVE verify status by comparing immigrant documents to DHS database
- Immigrants must be given “reasonable opportunity” to provide documents
- If otherwise eligible, immigrant application should not be delayed, denied, reduced or terminated while immigration documents are being gathered or status is being verified
- Notice of receipt for replacement documents may be accepted



# Verification of Immigration Status

- ❑ Those applying must supply valid SSN with some exceptions (emergency Medicaid, children's/pregnant women's medical)
  - alternate proof of status may be sufficient for some programs
  
- ❑ SS# not required for non-applying household members or those ineligible for SS#

However, alternate proof of income will likely be required to determine household eligibility

# Privacy Protections

Federal and state laws protect the privacy of people who apply for or use public benefits.

In general, information provided on benefits applications should only be used for eligibility determinations and must be protected from unauthorized disclosure for other purposes.

# Privacy Protections

Privacy Act – protects information provided by lawful permanent residents (and citizens)

Affordable Care Act – includes privacy protections

Reaffirming Washington's Commitment to Tolerance, Diversity, and Inclusiveness (Exec. Order 17-01, February 23, 2017)

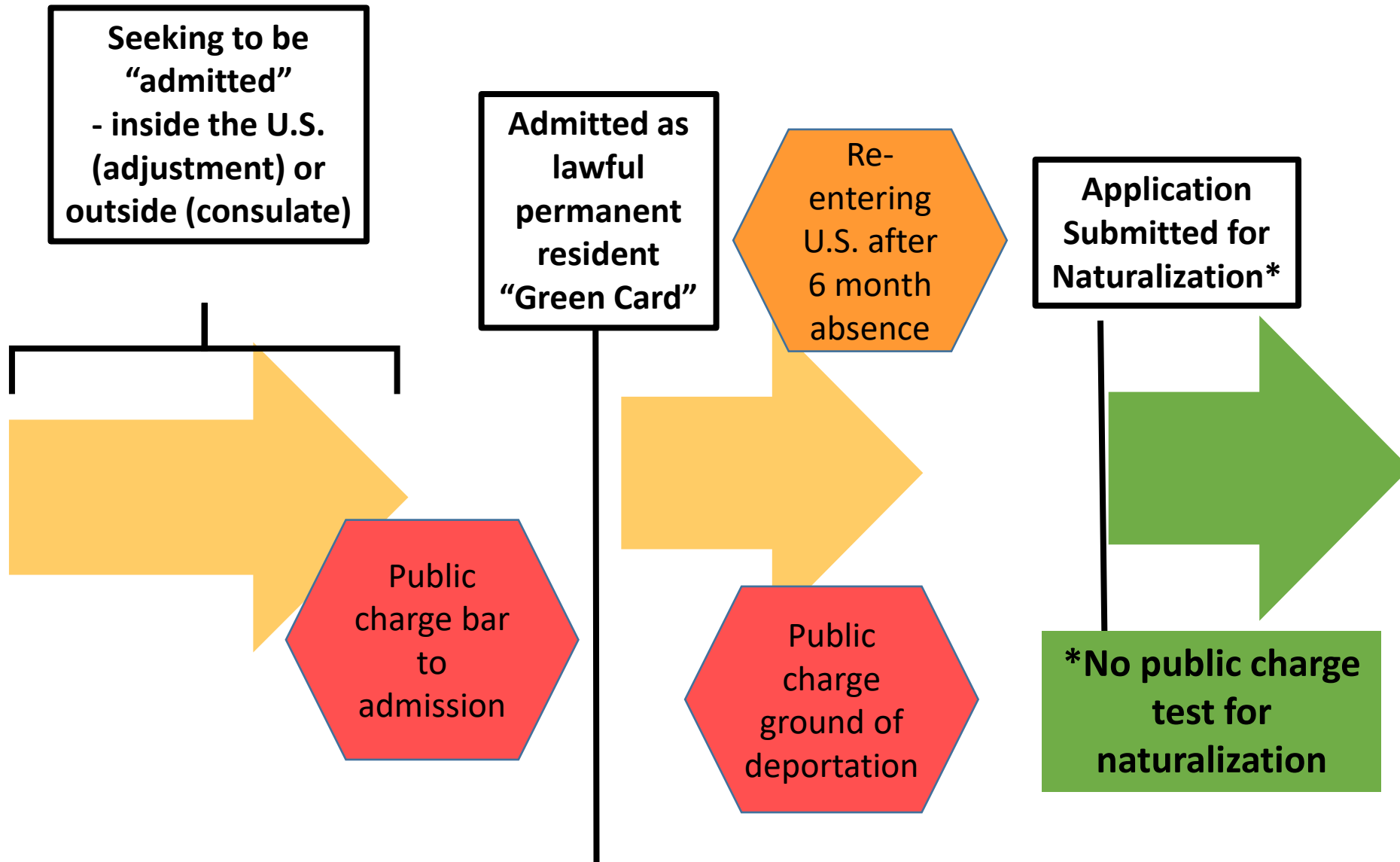
# Public Charge Issues

- Why are we talking about this now?
- Who is affected?
- When in the immigration process are they affected?
- How to talk about it with clients?

# Public Charge Issues

- Immigration consequences for people who are or are likely to become “public charges” (to depend on government benefits for support)
- Current public charge policy guidance has been in effect since 1999
- A draft proposed rule was sent to OMB 3/29/2018 – if finalized would change policy for persons applying for status inside the U.S.
- The State Department revised public charge instructions in its Foreign Affairs Manual in January 2018. Affects people applying outside the U.S.

# When does public charge test apply?



# *When Does Public Charge Test Apply?* Inadmissibility

An immigrant who  
**“is likely at any time to become  
a public charge”** is inadmissible.

INA 212(a)(4)

age

health

family  
status

assets,  
resources and  
financial status

education  
and skills

Affidavit of  
Support

# *When* Does Public Charge Test Apply? Deportability

Applies if a person becomes a public charge

within five years after the date of entry

for causes not affirmatively shown to have  
arisen since entry

RARELY  
ENFORCED

INA 237(a)(5)



# *Who* is subject to the Public Charge test?

- **Particularly** affects people who are seeking to get legal status through a visa petition filed by a U.S. Citizen or Lawful Permanent Resident family member.
- Some employment based visas
- Diversity visas (visa lottery)

# Immigrants not subject to public charge ground of inadmissibility

**refugees**

**asylees**

**victims of  
trafficking**

**VAWA self-  
petitioners**

**VAWA  
cancellation**

**U visa  
holders**

**special  
immigrant  
juveniles**

**NACARA**

**certain Cubans  
and Haitians**

**Lautenberg  
parolees**

**registry  
applicants**

# Current PC policy v. draft proposed rule – people applying for status inside the U.S.

## Current Policy

Only cash assistance or long term care in an institutional setting is considered

Receipt of assistance by a family member is only considered if it is the family's sole source of support

## Draft Proposed Rule

Broad range of benefits – including medical – could be considered. This includes Medicaid, CHIP, subsidies for QHPs, etc.

Broader consideration of receipt of assistance by family members

## Current PC policy - persons applying for status/seeking admission outside the U.S.

Under the revised Foreign Affairs Manual,

- Affidavit of Support is positive factor but not enough on its own
- Non-cash public benefits may be considered
- May consider family member's or sponsor's use of benefits

but still is forward looking test that must consider “totality of the circumstances.”

# Public Charge - Talking With Clients

- The policy on public charge decisions made in the U.S. has not changed at this time
- If the proposed rule is published, there will be a 60 day comment period before it can be finalized
- Noncash benefits (other than long term care) received before the rule is finalized will not be considered
- Going off assistance now, or taking family members off assistance, likely won't help

# Public Charge - Talking With Clients

- The test remains a forward looking test that requires consideration of a number of factors, not just receipt of benefits
- Not all immigrants are subject to the public charge test
- There is no public charge test for naturalization applicants
- Privacy protections for benefits applications remain in place

# Public Charge - Talking With Clients

- People on public assistance should limit their trips outside the U.S. to less than 6 months
- Be truthful and report any changes to benefits-granting agencies.
- Consult with an attorney about your individual situation.

# DACA Update

- DACA = Deferred Action for Childhood Arrivals
- 9/5/2017 AG announced “winding down” of DACA program
- Current DACA recipients can still renew their DACA status- based on court orders.
- The future outlook is uncertain as there are several ongoing court cases and appeals.



## DACA Eligibility

- Specifically excluded from federal eligibility for Qualified Health Plans/subsidies& tax credits
- Included as “lawfully present” for purposes of Washington state programs
- There may be an argument for state eligibility to continue after DACA status expires

# DACA

## What to tell Community

- If their DACA expires within the next 150 days, apply to renew ASAP.
- If DACA expires between 151-365 days, should seriously consider applying to renew now. Still likely that US CIS will process it.
- IF DACA expired, apply to renew ASAP. (If expired > year, will have to submit as initial application.)

# DACA

## Renewal Fees

- Look for scholarships to cover \$495 Filing Fee. Several orgs have been fundraising for this purpose
- Recognize that the DACA will expire 2 years from the date of the renewal approval date.

# DACA

## Those Who Never had Status

- Immigration attorneys advise people to prepare for possible future programs by keeping documents that prove physical presence in the U.S., education, work history, payment of taxes, and community involvement.
- Northwest Immigrant Rights Project has Friday walk in hours in Granger for consultations.

# U Visa Eligibility

- For individuals who are victims of certain crimes (including D.V., assault, fraud in foreign labor contracting), cooperate with law enforcement, and have suffered substantial harm.
- Requires certification from a law enforcement agency such as police, Department of Labor, or Human Rights Commission.
- Long waiting lists because limited to 10,000 per year nationally. Eventually can lead to Green Card.

# Immigration Enforcement

- We have NOT seen workplace raids or other large scale raids in Washington state at this time.
- We have seen increase in people who are being picked up for past immigration violations despite lack of criminal history.
- Individuals are being detained outside of courthouses, and from jails.

# ICE Reporting Hotline

- The Washington Immigrant Solidarity Network has a volunteer hotline for reporting ICE enforcement activity.
- Volunteers will go to scene of reported raids to verify whether it is real or just a rumor.
- Please do not spread unverified rumors of ICE presence in the community, as it causes panic.
- **1- 844-724-3737**
- Waimigrantsolidarity network on Facebook.
- Text alert sign up to receive news of verified Raids: JOIN to 253-201-2833.

# Enforcement Tactics

- The Bureau of Indian Affairs invited CBP agents (Customs and Border Patrol) to come to Toppenish and Wapato to enforce drug laws. They did traffic stops. They asked about immigration papers but did not detain those who were undocumented.
- In Basin City, local sheriffs helped ICE pull over workers in the early morning and ask about papers. There was a specific targeted individual, but they detained others driving by.



# Examples of Unfounded Rumors

- A posting on Facebook of a white bus in Mattawa: it was actually a bus used to drive H-2A workers to the grocery store to go shopping.
- Postings of white vans spotted all over central Washington: none of them were verified as ICE.

# Resources

- Numerous articles on immigrant eligibility for public benefits, DACA, public charge, and other issues at [www.nilc.org](http://www.nilc.org)
- Community education publications on immigrant eligibility for benefits in WA state at [www.washingtonlawhelp.org](http://www.washingtonlawhelp.org)
- Updates on public charge issues at [www.childrensalliance.org/protecting-washingtons-immigrant-families](http://www.childrensalliance.org/protecting-washingtons-immigrant-families)
- Northwest Immigrant Rights Project [www.nwirp.org](http://www.nwirp.org)

# THANK YOU FOR ATTENDING

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To Follow-Up on Workshops, please contact:  
Patricia Gepert, [PGepert@wacmhc.org](mailto:PGepert@wacmhc.org)

