



Tailored Plan Auto-enrollment & Opt-in Scenarios

March 2024

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Tailored Plan Beneficiary Enrollment Diagram



Tailored Plan Criteria Review

NC Medicaid identifies beneficiaries who qualify for Tailored Plan based on the lookback period.

Auto-enrollment

NC Medicaid uses an enrollment algorithm to enroll beneficiaries in a Tailored Plan.

Enrollment Broker Notice

Beneficiary receives information about their Tailored Plan and health care options.



Choice Period

Beneficiaries can contact their **Tailored Plan**:

- **Auto-enrolled**: Select a primary care provider (PCP).

Beneficiaries can contact the **Enrollment Broker**:

- **Opt-In**: Choose the Tailored Plan or a different health care option (if applicable).



Auto-assignment

Beneficiaries will be assigned a PCP if they do not actively choose during the choice period



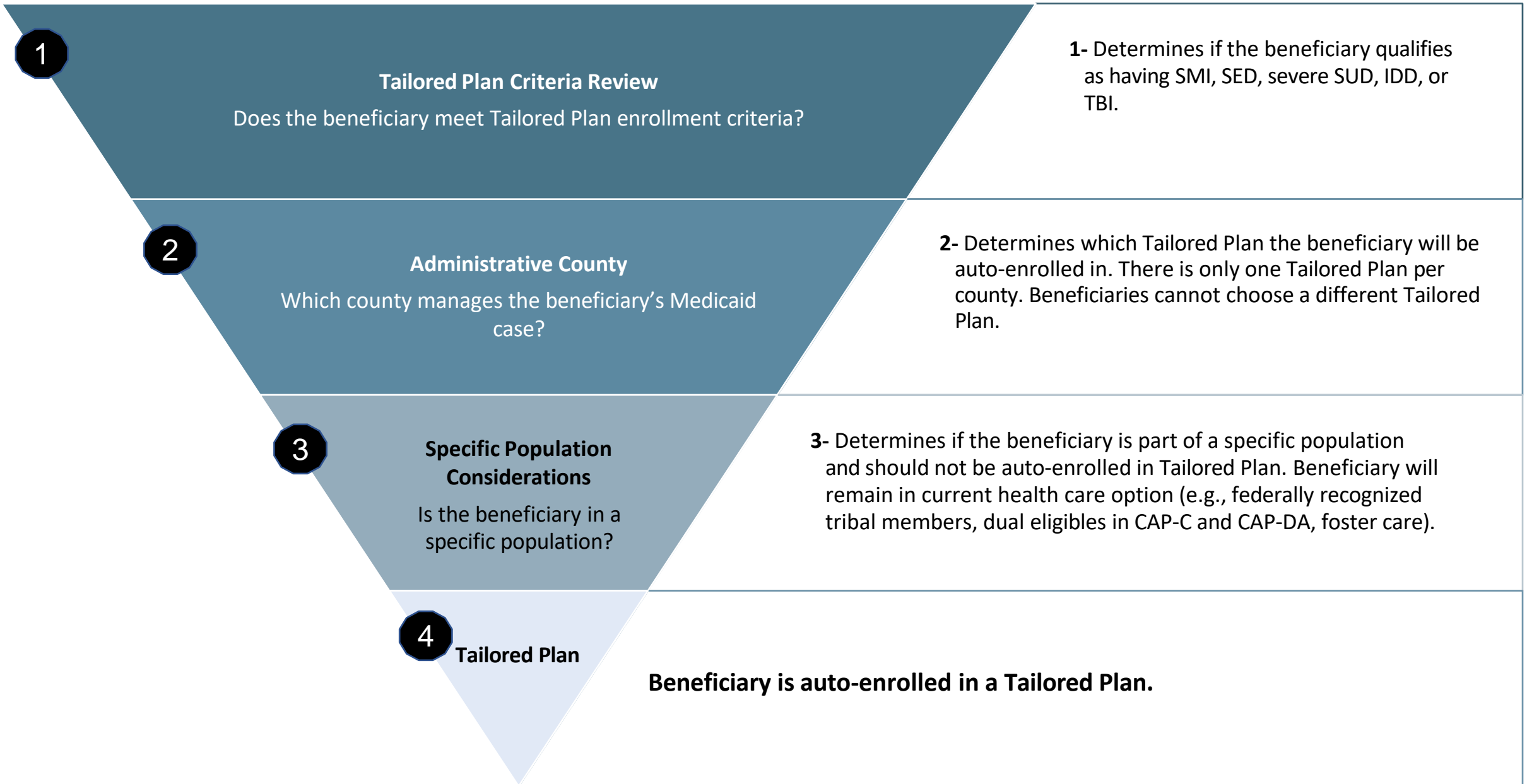
Communicate

Tailored Plans send Welcome Packets and Health Plan ID cards to their beneficiaries. *

* Beneficiaries who are a part of the opt-in population and do not enroll in a Tailored Plan will receive Welcome Packets and ID cards from the health care option they selected.

* Some beneficiaries who do not meet TP criteria are not otherwise eligible for TP and will remain in MD.

Tailored Plan Auto-enrollment Algorithm





Tailored Plan Auto-enrollment Scenarios



Scenario 1A: Tailored Plan Beneficiary: **Auto-enrolled**

Barbara is a Medicaid beneficiary who is enrolled in NC Medicaid Direct. She lives in Wake County and her Medicaid case is managed by Wake County. She currently receives services through the Innovations Waiver. Barbara receives a notice from the NC Medicaid Enrollment Broker letting her know she has been enrolled in Alliance Health (Tailored Plan) and will begin receiving health care services from Alliance Health (Tailored Plan) on July 1, 2024..

1 Tailored Plan Criteria Review

Barbara was determined to be eligible for Tailored Plan because she is enrolled in NC Innovations Waiver.

2 Administrative County

Barbara's Medicaid is managed by Wake County.

3 Specific Population

Barbara is not part of a specific population.

4 Auto-enrollment

Barbara is enrolled in Alliance Health (Tailored Plan).

Barbara receives a notice from the NC Medicaid Enrollment Broker.

Barbara will be able to choose her primary care provider (PCP) through Alliance Health (Tailored Plan).

Barbara will not lose her Innovations Waiver services (slot) due to enrollment in the Tailored Plan.



Scenario 1B: Tailored Plan Beneficiary: **Auto-assignment & Choice Period**

Does not choose a PCP during the Choice Period

Barbara is auto-enrolled in Alliance Health (Tailored Plan). She got a letter in the mail from the Enrollment Broker letting her know about her new Tailored Plan and to select a PCP. She did not actively choose one before May 15, 2024.

① Primary Care Provider

Barbara will be auto-assigned to a PCP on May 16, 2024.

② Tailored Care Management Provider

Barbara has been receiving Tailored Care Management (TCM) through her LME/MCO since Dec. 1, 2022. There are no changes to her TCM provider, but Barbara can call her Tailored Plan to change her TCM provider if desired.

③ Welcome Packet

Barbara receives a Welcome Packet and Medicaid ID card from Alliance Health (Tailored Plan) with her PCP and Tailored Care Management provider information.

If she wants to change her PCP or TCM provider, Barbara can call her Tailored Plan at the number listed on her Medicaid ID card.



Scenario 2: Tailored Plan Beneficiary: **Auto-enrolled & Choice Period**

Chooses a PCP/TCM provider during the Choice Period

Terry is auto-enrolled in Trillium (Tailored Plan). She received a notice in the mail from the NC Medicaid Enrollment Broker about choosing her PCP. Terry selected her PCP and Tailored Care Management provider.

① Primary Care Provider

Terry calls the Enrollment Broker to choose her PCP. The Enrollment Broker refers Terry to Trillium (Tailored Plan), letting her know that her health plan can help her choose providers.

Terry calls Trillium directly to learn more about the PCPs in Trillium's network.

Dr. Wright, Terry's current PCP, is contracted with Trillium. Terry chooses Dr. Wright as her PCP.

② Tailored Care Management Provider

Terry has been receiving Tailored Care Management through her LME/MCO but wants to choose a new TCM provider. Terry calls Trillium (Tailored Plan) to learn more about her options for TCM providers.

Trillium (Tailored Plan) educates Terry about TCM providers that are in their network and Terry chooses the provider she likes.

③ Welcome Packet

Terry receives a Welcome Packet and Medicaid ID card from Trillium (Tailored Plan) with her PCP and TCM provider information.

If she wants to change her PCP or TCM provider, Terry can call her Tailored Plan at the number listed on her Medicaid ID card.



Scenario 3: Tailored Plan Beneficiary: **Auto-Enrollment and Choice Period** Chooses a Standard Plan during the Choice Period

Jeremy is a Medicaid beneficiary who is enrolled in Healthy Blue. Jeremy receives a notice from the NC Medicaid Enrollment Broker letting him know he has been auto-enrolled in Alliance (Tailored Plan) and will begin receiving health care services from Alliance (Tailored Plan) on July 1, 2024, unless he chooses a different health plan. Jeremy wants to stay enrolled in Healthy Blue.

1 Tailored Plan Criteria Review

Jeremy is determined to be eligible for Tailored Plan because he has a diagnosis of Bipolar I Disorder and received partial hospitalization (an enhanced behavioral health service) during the lookback period.

2 Administrative County

Jeremy's Medicaid is managed by Harnett County.

3 Specific Population

Jeremy is not part of a specific population.

4 Auto-Enrollment

Jeremy is enrolled in Alliance (Tailored Plan).

Jeremy receives a notice from the NC Medicaid Enrollment Broker.

5 Choice Period

Jeremy contacts the NC Medicaid Enrollment Broker, to let them know he wants to stay enrolled in Healthy Blue.

The NC Medicaid Enrollment Broker educates Jeremy on the Tailored Plan and Standard Plan services and provides choice counseling. Jeremy confirms his decision to re-enroll in Healthy Blue.



Tailored Plan
Opt-in Scenarios



Scenario 4: Tailored Plan Beneficiary: **Opt-in** Stays in current health care option during Choice Period

Tyler is a Medicaid beneficiary who is enrolled in the EBCI Tribal Option. He currently receives behavioral health services. He receives a notice from the NC Medicaid Enrollment Broker letting him know there is a new health plan, Tailored Plan, available to him. Tyler lives in Cherokee County and his Medicaid case is managed by Graham County.

1 Tailored Plan Criteria Review

Tyler is determined to be eligible for Tailored Plan during the lookback period because he had multiple psychiatric inpatient admissions.

2 Administrative County

Tyler's Medicaid case is managed by Graham County.

3 Specific Population

Tyler is a federally recognized tribal member who lives in Cherokee County.

4 Opt-In

Tyler is not auto-enrolled in a Tailored Plan but can choose a Tailored Plan (Vaya Health).

Tyler receives a notice from the NC Medicaid Enrollment Broker.

5 Choice Period

Tyler contacts the Enrollment Broker to learn more about Vaya Health (Tailored Plan). Tyler decides to stay enrolled in the EBCI Tribal Option.



Tailored Plan TCM Scenarios



Scenario 5: Tailored Plan Beneficiary: **Auto-enrolled and newly receiving TCM**

Mark is enrolled in NC Medicaid Direct. He currently receives enhanced behavioral health services. He receives a notice from the NC Medicaid Enrollment Broker letting him know he will be enrolled in the Tailored Plan. Mark is not currently receiving TCM services through his LME/MCO because he previously opted out. Mark lives in Graham County and his Medicaid case is managed by Graham County.

1 Tailored Plan Criteria Review

Mark was determined to be eligible for Tailored Plan because he receives inpatient behavioral health services.

2 Administrative County

Mark's Medicaid case is managed by Graham County.

3 Specific Population

Mark is not part of specific population.

4 Auto Enrollment

Mark is auto-enrolled in Vaya Health (Tailored Plan).

Mark receives a notice from the NC Medicaid Enrollment Broker.

Mark will be able to choose his PCP and TCM provider through Vaya Health (Tailored Plan).

5 Welcome Packet

Vaya Health (Tailored Plan) will send Mark his Medicaid ID card, Member Handbook(s) and welcome letter with information about the Tailored Plan. Mark's PCP will be listed on his Medicaid ID card and his TCM provider will be on the TCM assignment letter.



Scenario 6: Tailored Plan Beneficiary: Auto-enrolled and Changing TCM provider

Molly is a Medicaid beneficiary who is enrolled in NC Medicaid Direct. She is receiving Innovations Waiver services. Molly received a letter from the LME/MCO with her Tailored Care Management provider as her current waiver care coordinator. Molly receives TCM services but wants to change her TCM provider. The Enrollment Broker sends her a letter letting her know she is enrolled in the Tailored Plan.

Molly will continue to receive TCM from the Tailored Plan after July 1, 2024.

1 Tailored Plan Criteria Review

Molly is determined to be eligible for Tailored Plan during the lookback period because she is on the Innovations Waiver.

2 TCM Assignment

Molly was assigned her current care coordinator as her TCM provider through the LME/MCO.

3 Auto Enrollment

Molly is auto-enrolled in the Tailored Plan.

Molly receives a notice from the NC Medicaid Enrollment Broker.

4 TCM Choice

Molly calls the LME/MCO to change her TCM provider. The LME/MCO helps her select a new TCM provider and lets her know she will continue to receive TCM and Innovation Waiver services when enrolled in the Tailored Plan.

5 Welcome Packet

Molly's Tailored Plan will send her Medicaid ID card, Member Handbook(s) and welcome letter with information about the Tailored Plan. Molly's PCP will be listed on her Medicaid ID card.