MCO Manual Tracker Procedure

Purpose: This new process replaces the current MCO tracker (email/spreadsheet) with the use of the Salesforce CRM. The process includes CSR and QC handling.

The following types of cases can be sent for MCO enrollment "consideration":

- **Angela Melody**

These cases are related to MCO are severing their relationships with Providers. Identified will be given a specified period of time to choose another PCP in the participating MCO or enroll in another MCO. Enrollment changes can only be processed during the specified enrollment period. Request after that, if applicable, are processed through 'For Cause Reason" guidelines.

- **MCT Span**

These cases are related to consumers who are currently enrolled in Medicaid but no MCT Span has been updated in MMIS for MCO enrollment to be processed.

Valid "For Cause Reason" not processing in HBX (Homeless Consumer, Foster Care Consumer, ARC, New County or Family Unification.)
These cases are related to the consumers who based on MMIS screen 9 enrollment should be allowed to change MCO but HBX is not allowing the transaction

- **Incorrect MCO Selection (Exchange Error)**

These cases are related to MCO selection processed incorrectly by the CSC or a Consumer Assistance Worker. These cases do not include auto-assignments. Auto-Assignment changes are processed through the HBX under the 90 Day Right to Change Rule.

CSR Salesforce Processing

CSR Salesforce CRM

Case Record Type:	Medicaid	Case Record Type:	Medicaid	Case Record Type:	Medicaid
Category:	MCO Plan Shopping	Category:	MCO Plan Shopping	Category:	MCO Plan Shopping
Sub-Category:	NA	Sub-Category:	Angela Melody	Sub-Category:	Angela Melody
Disposition:	Plan Selected in Error	Disposition:	Question Answered	Disposition:	MCO Updated
Child Disposition:	NA	Child Disposition:	NA	Child Disposition:	NA
Status:	Escalated (auto-gen. in system)	Status:	Closed (auto-gen. in system)	Status:	Closed (auto-gen. in system)
Owner CRM Escalations:	MHBE CRM Escalations	Owner CRM Escalations:	MHBE CRM Escalations	Owner CRM Escalations:	MHBE CRM Escalations

Note: To be used for all manual reasons except Angela Melody

Were the Consumer's issues resolved?   No   Did the Consumer request a Supervisor?   Yes or No

Subject and CRM documentation

Subject: **Angela Melody**	**Subject:** **For Cause Reason – (Specific For Cause Reason)**
CRM: Participant Name(s)/MA/SSN/New MCO or New Provider Name	CRM: Participant Name(s)/For Cause Reason/MA/SSN/New MCO
	Subject: **Incorrect Selection**
Subject: **MCT Span**	CRM: Participant Name(s)/MA/SSN/Correct MCO Choice
CRM: Participant Name(s)/MA/SSN/Requested MCO	

Salesforce Reporting
QC Team

Reports & Dashboards

Action	Name		Folder	Created By
▼	**MCO Manual Tracker** CRM Replacement for Excel Tracker		Unfiled Public Reports	Brown, Tracy

Report Filters

CSR Dispositions: Plan Selected in Error and MCO Updated = Cases that need to vetted and processed by State Monitors

- **Angela Melody**
- **MCT Span**
- **For Cause Reason**
- **Incorrect Selection (Exchange Error)**

2) QC Vetting

Once the case has been fully vetted and is determined to be a "true" tracker case, the QC Team Lead will update the taxonomy as shown below

If the case is not a "true" tracker case the case will be relabeled and sent back to the Supervisor for Consumer outreach.

State Monitor Hand-Off

3) QC Team will forward the report of "True" tracker cases to the State Monitors for MMIS and CRM processing

MCO Plan Shopping/Unable to Plan Shop/Plan Selection Corrected

"True" Tracker Case   Case Record Type: Medicaid

Category:	MCO Plan Shopping	Case Record Type:	Medicaid
Sub-Category:	Unable to Plan Shop	Category:	MCO Plan Shopping
Disposition:	Plan Selection Corrected	Sub-Category:	Unable to Plan Shop
Child Disposition:	NA	Disposition:	Outreach Required
Status:	Closed (auto-generated in system)	Child Disposition:	NA
Owner CRM Escalations:	MHBE CRM Unassigned	Status:	Closed (auto-generated in system)
	"False" Tracker Case	Owner CRM Escalations:	MHBE CRM Unassigned

State Monitors

Upon receipt of the cases the State Monitors will take the appropriate actions in MMIS. If a case cannot be processed by the State Monitors. The spreadsheet will be updated and sent back to the QC Team for Supervisor notification and outreach.

Supervisors

Each Supervisor will be responsible for ensuring outreach has occurred on their cases escalated in error. They will be responsible for two (2) outreach attempts, updating CRM documentation and CRM Taxonomy.

<p align="center">"False" Tracker Case or Cases Not Processed By State Monitor</p>

<u>QC Team – Taxonomy</u>		<u>Supervisor/Team Lead – Taxonomy</u>		<u>Supervisor/Team Lead - Taxonomy</u>	
Case Record Type:	Medicaid	Case Record Type:	Medicaid	Case Record Type:	Medicaid
Category:	MCO Plan Shopping	Category:	MCO Plan Shopping	Category:	MCO Plan Shopping
Sub-Category:	Unable to Plan Shop	Sub-Category:	Unable to Plan Shop	Sub-Category:	Unable to Plan Shop
Disposition:	Outreach Required	Disposition:	Outreach 1st Attempt	Disposition:	Outreach Max Attempts
Child Disposition:	NA	Child Disposition:	NA	Child Disposition:	NA
Status:	Closed (auto-generated in system)	Status:	Escalated (auto-generated in system)	Status:	Closed (auto-generated in system)
Owner CRM Escalations: MHBE CRM Unassigned		Owner CRM Escalations: MHBE CRM Unassigned		Owner CRM Escalations: MHBE CRM Unassigned	