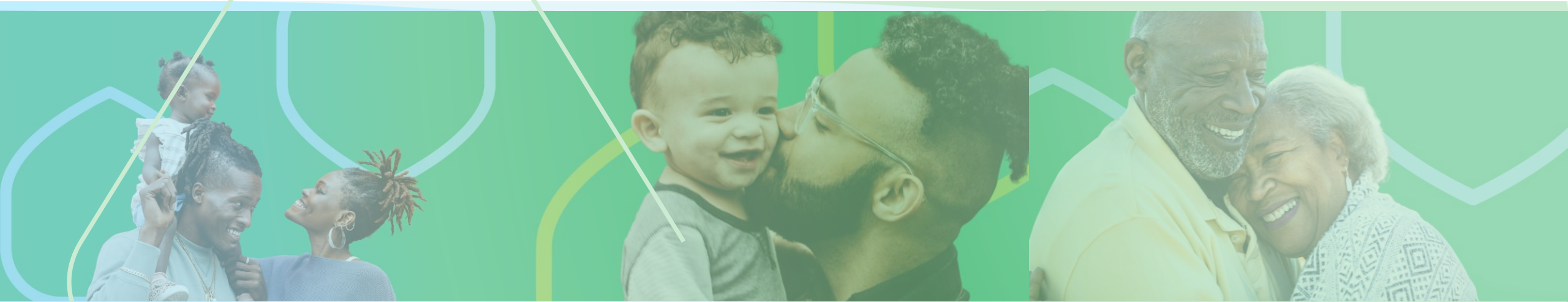


GEORGIA ACCESS



September Office Hours for Navigator Grantees
September 19, 2024

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GEORGIA ACCESS ASSISTER PROGRAM TEAM



Dr. Tangelia Clary-Marshall
Engagement Director



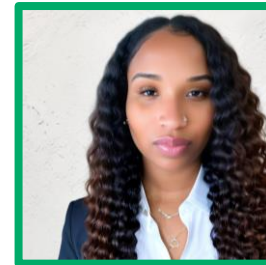
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Assister Program Analyst



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Assister Program Analyst

GEORGIA ACCESS OVERVIEW

GEORGIA ACCESS OVERVIEW

Georgia is making significant strides in improving access to affordable, quality insurance across the state for consumers.

The Office of Commissioner of Insurance and Safety Fire (OCI) launched the Georgia Access Division in 2023.

Georgia Access is the State's program for eligible Georgians to shop for and enroll in health insurance.

Georgia Access will go live on November 1, 2024 as a State-based Exchange (SBE) for Open Enrollment (OE) 2025.

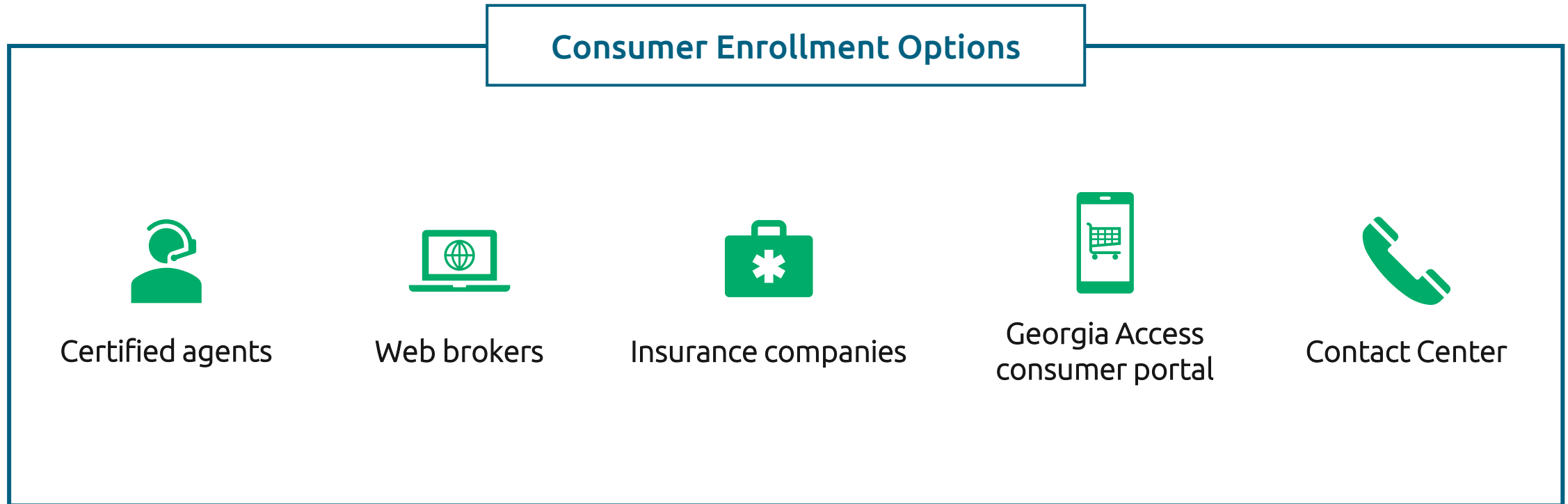


GEORGIA ACCESS GOALS

- 1** Increase the number of insured Georgians.
- 2** Improve the shopping and enrollment experience for consumers.
- 3** Strengthen competition, innovation, and private sector investment in Georgia's market.

GEORGIA ACCESS ENROLLMENT OPTIONS

Georgia will be the first SBE in the country that will provide a state-run consumer portal and private entity shopping and enrollment options.

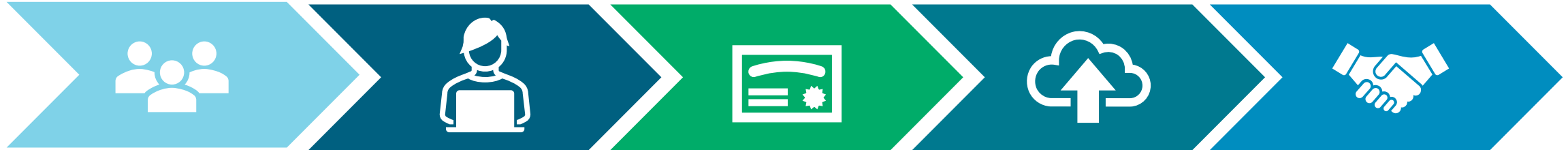


Navigators are NOT permitted to enroll consumers in a healthcare plan.

NAVIGATOR GRANTEE PROGRAM REQUIREMENTS

OVERVIEW OF NAVIGATOR REQUIREMENTS

Navigators are required to be licensed and certified to assist consumers on Georgia Access for Plan Year (PY) 2025.



1. Affiliate with a Navigator Grantee Organization

Navigators are required to be hired or volunteer as part of a Navigator Grantee organization.

2. Complete Pre-Licensing

Navigators are required to complete pre-licensing training and pass the final assessment from an approved training provider. Additional details are found on the [Office of the Insurance and Safety Fire Commissioner \(OCI\) website](#).

3. Complete Certification Training and Assessment

Navigators must complete the Georgia Access certification training and final assessment by 11/1 to be ready to support consumers on 11/1 for Open Enrollment.

4. Submit License Application

Submit a new license application or renewal application on Sircon. Navigators receive a Navigator license.

5. Begin Assisting Consumers

Navigators receive an email from OCI confirming their license is approved. Navigators are then eligible to begin supporting consumers.

NAVIGATOR GRANTEE RESPONSIBILITIES

Navigator Grantees retain the primary responsibility for planning, directing, and executing the proposed project as outlined in the Navigator Grant application.



Oversee Navigators

- **Monitor Navigators & Confirm Compliance:** Confirm that affiliated Navigators adhere to license and certification requirements. Confirm that Navigators follow all Georgia Access Navigator Grant Agreement requirements.
- **Report Incidents:** Report any privacy and security incidents or negative behavior/fraud by a Navigator to Georgia Access.
- **Provide Updated Lists of Affiliated Navigators:** After OE Navigator Grantees are required to send updated lists of affiliated Navigators whenever a Navigator joins or leaves the organization.



Program Management

- **Conduct Outreach Activities:** Coordinate three (3) outreach events per month, with an emphasis on targeting uninsured individuals or underserved or vulnerable populations.
- **Collect Metrics & Submit Reports:** Provide monthly, quarterly, and annual program reports to Georgia Access.
- **Protect Consumer Privacy & Security:** Maintain the privacy and security plan submitted as part of the Navigator Grant Application to maintain the privacy and security of all consumer data.
- **Report Budget Changes:** Navigator Grantees that would like to modify their budget or re-allocate funding are required to submit their revised budget to Georgia Access for review and approval.

NAVIGATOR GRANT PAYMENTS

Georgia Access Navigator Grant payments are disbursed by the Office of Commissioner of Insurance and Safety Fire (OCI) and are issued according to the following cadence.



The State distributed an **initial lump sum payment of 20%** of the total grant amount by September 3, 2024.






The remaining 80% of the grant funding will be distributed in **10 equivalent monthly payments** by the end of each month, October 2024 through July 2025.



Continued payments are **dependent on timely submission** of required reports and adherence to program requirements.

NAVIGATOR GRANTEE REPORTING REQUIREMENTS

Navigator Grantees are required to submit participation and application assistance data to Georgia Access on a recurring basis for program evaluation. Reporting requirements are listed below.

Report Type	Content	Deadline
<div> Monthly Programmatic Metrics</div>	<ul style="list-style-type: none">• Program Summary Metrics• Outreach and Education Event Information• Budget Report	Due by the 15th day of each month, November 2024 – September 2025*
<div> Quarterly Programmatic Metrics</div>	<ul style="list-style-type: none">• Culturally and Linguistically Appropriate Services (CLAS) standards• Assisting Consumers with Disabilities• Common Languages• Protecting Consumer Personally Identifiable Information (PII)• Reducing Health Disparities and Inequity	Data should be tracked beginning October 15, 2024, and reports are due: <ul style="list-style-type: none">• December 15, 2024*• March 15, 2025*• June 15, 2025*• September 15, 2025*
<div> Annual Financial Reporting</div>	<ul style="list-style-type: none">• Total State Funds• State Funds Expenditures and Unobligated Balance• Recipient Share• Program Income	September 15, 2025

**If the report deadline falls on a weekend, the report is due the last weekday prior to the deadline.*

FIRST MONTHLY REPORT OVERVIEW

Navigator Grantees are required to submit their first monthly report by November 15 to Navigators@GeorgiaAccess.ga.gov. The report should include data collected between October 1st through November 15.

Quantitative Metrics Section	
1. General Information	5. Complex Cases and Other Georgia Access Assistance and Support Issues
Licensed Navigators	Complex case help center assistance and referrals
Site visits conducted	Data matching issues/periodic data matching issues assistance
Site visits conducted with subrecipients (if applicable)	SEP eligibility troubleshooting assistance
Internal trainings with staff and subrecipients (if applicable)	Employer-sponsored coverage issues assistance
Breaches with protocols for collecting PII or retaining consent forms. If a breach has occurred, describe the situation.	APTC/CSR assistance
2. Consumer Assistance	Other
Appointments scheduled with consumer (not including those rescheduled)	6. Referrals
Appointments scheduled and held with consumers	Received from other entities
Follow-up calls and/or appointments with consumers	To agents/brokers
3. Consumer Inquires	To insurance companies
Health insurance options	To Medicare
Health insurance literacy	To Medicaid/CHIP
Locating providers	To other consumer assistance/health insurance programs
Billing and payment questions	7. Budget Report
Evaluating health care options using tools and information available through a consumer's health plan	Specify how grant funds were spent compared to original budget request
Accessing preventative health services	
4. Georgia Access Application Assistance & Support	
Georgia Access accounts created	
Georgia Access eligibility assessment and results review	
Consumers assisted to compare Georgia Access plans	
Total consumers supported/assisted	
Consumers supported by county (Complete Appendix A)	
Applications started	
Applications completed	
Total hours spent on application assistance	

Short Answer Section: Outreach & Education Event Information
Event Information
Event Description
Event Data
Event Partners
Lessons Learned

BEST PRACTICES FOR ASSISTING CONSUMERS

BEST PRACTICES FOR CONSUMER ASSISTANCE

Many consumers have limited knowledge of benefits and coverage options, which makes it crucial that Navigators utilize best practices when assisting consumers.

ASK THE RIGHT QUESTIONS

- Conducting a needs assessment can provide a clearer picture of a consumer's situation and needs. Asking questions will help you narrow down a solution to address the consumer's situation. Most consumers are either **seeking information** or **seeking coverage**.

IDENTIFY VULNERABLE OR UNDERSERVED POPULATIONS

- Identify if the consumer belongs to vulnerable or underserved populations to understand how to best serve the consumer.

GET CREATIVE

- Look for workarounds. When trying to help a consumer you may not be able to verify their identity.
- Asking the right questions will allow you to effectively provide assistance.
- Be patient. Some consumers may not know how to use technology even if they have internet access.
- Try a variety of solutions to help provide consumers with the support they need.

It is important to help consumers understand the connection between health coverage, medical treatment, and being healthy.



STRATEGIES FOR EFFECTIVE COMMUNICATION

Effective communication is key to earning consumers' trust. Effective communication strategies include:



Adapt to Cultural and Linguistic Differences. Cultural and linguistic differences require you to identify and understand a consumer's cultural beliefs, behaviors and needs.



Assess Literacy Level. A consumer's literacy level (their ability to read and write) plays a significant role in how they understand their health coverage options. You must work with this understanding to bring the consumer to a place where they are willing to enroll.



Identify a Consumer's Health Literacy Level. Health literacy is the ability to access and understand basic information about health coverage to make decisions on coverage. Communicate with a consumer at their health literacy level to effectively share plan information.



Accommodate Physical and Intellectual Disabilities: Consumers with physical or intellectual disabilities may need help to gain access to coverage information. These consumers may need to be matched to special services.

OUTREACH EVENT BEST PRACTICES

Navigator Grantees are required to conduct three (3) outreach events per month. Understanding the goals of outreach events and best practices to meet those goals will help Navigator Grantees reach consumers in their communities.

OUTREACH EVENT GOALS

Provide Free In-Person Assistance

Promote Education

Build Trust

Align with Strategic Opportunities

OUTREACH EVENT BEST PRACTICES



Promote Outreach Events

- Promote through effective communication channels (social media, radio, email, flyers).



Understand the Community

- What are the community's needs?
- What enrollment challenges does the community face?
- What are the community's trusted sources of information and support?
- What resources are already available?



Host Different Types of Outreach Events

- Face-to-face Outreach (e.g., distributing brochures/fliers, presentations)
 - High-traffic Activities
- Media (Social media campaigns, radio, local newspapers etc.)
- Local Partnerships

OUTREACH RULES

Navigators must adhere to the following rules when conducting outreach to consumers.



Gifts and promotional items must be only of nominal value and may not be purchased with Georgia Access (grant or other federal) funds. Navigators are **prohibited from providing gifts of any value** to a consumer as an incentive for enrollment.



Navigators **may not conduct outreach and education activities by going door-to-door** or through other unsolicited means of direct contact to consumers.



Navigators are **prohibited from calling consumers using an automatic telephone dialing system** or an artificial or prerecorded voice (frequently referred to as robocalls) unless the consumer has an existing relationship with the individual or organization.

OUTREACH TOOLKIT OVERVIEW

The Georgia Access Outreach Toolkit is a comprehensive guide for Navigator Grantees to raise awareness and market Georgia Access in the communities they serve.

CONTENT

1 Talking Points

Reference language to support discussions about Georgia Access with communities assisters serve.

2 Style Guide Roadmap

Georgia Access brand guidelines to create a consistent identity across all communication channels. The Style Guide Roadmap includes logos, spacing, color palette, font, tone of voice, and photography guidance.

3 Template Digital Content

Sample messaging and images for use across social media platforms such as Facebook, X (formerly Twitter), and Instagram.

4 Print Collateral

Posters, postcards, and other collateral to distribute to communities assistants serve.

5 Social Media Handles

Follow, connect, and engage with Georgia Access through the following accounts. Also consider sharing our posts and tagging our accounts in your communications.

DETAILS

Talking Points

Feel free to reference this language as you discuss the Columbia Access program with communities.

TALKING POINTS

- [illegible]

Georgia Access **BRAND GUIDELINES ROAD MAP**

Loan Overview



Tone of Voice



Example



Template Digital Content

Complete English:

HOW TO USE SOCIAL MEDIA CONTENT

The Toolkit contains sample messaging and images for use across social media platforms such as Facebook, X (formerly Twitter), and Instagram. See the next slide and supporting materials for additional content.

GUIDANCE ON HOW TO POST

- Please interact with and/or @GeorgiaArees and our social media handles ([See Page 15](#)) as you post.
- Please choose your preferred language(s) (i.e., those that your community members communicate with most comfortably) when posting to social media.
 - If your organization serves a Spanish-speaking population, please publish the post twice (once in English and once in Spanish) so those audiences can receive the message. Spanish-language materials are included in the toolkit.

[Print Collateral](#)

Full Text Available:

HOW TO DISTRIBUTE COLLATERAL

Distribute collateral in your organization's offices and at outreach events, depending on existing communication and outreach tactics.

EXAMPLES

- Pin posters up on your community bulletin boards.
- Make posters available in locations frequented by community members.
 - If your organization serves a Spanish-speaking population, please make collateral available in Spanish so that those audiences can receive the message. Spanish language materials are included in the toolkit.
- Share appropriate collateral with business partners, corporations/organizations as you see fit.



Toolkit Materials: Social Media Handles

Follow, connect, and engage with us through the following accounts. Also consider sharing our posts and tagging our accounts in your communications. Reach out to Access@CambridgeAccess.org with questions.



OUTREACH TOOLKIT COLLATERAL

The Georgia Access Outreach Toolkit will include additional collateral, including print and digital resources, that assisters can use to promote Georgia Access among target populations. Toolkit collateral will be distributed in late September.

- 🎯 **Print and digital collateral will be distributed in late September.** The Outreach Toolkit contains brand guidelines and examples of collateral.
- 🎯 **Resources will be available in English and Spanish** and contain key information about Georgia Access.
- 🎯 **Digital materials can be published on your organization's website** and social media. Digital content includes social media content, email copy, and slides for presentations.
- 🎯 **Print materials can be shared at in-person outreach events.** Material includes posters, flyers and postcards.
- 🎯 **Connect to target populations** Use the appropriate resources that connect to your organization's strategy to reach targeted populations and meet key goals.



Sample Facebook post

GEORGIA ACCESS ENTITY PORTAL

ENTITY PORTAL OVERVIEW

The Georgia Access entity portal is a new state-run portal that Navigator Grantees can use to manage individual, affiliated Navigators and that Navigators can use to support consumers with the application process.

Navigator Grantees

Activate Entity Portal Profile



Navigator Grantee leads will receive an email with instructions for how to access and activate an entity portal profile on October 15.

Manage Navigators



Navigator Grantees can use the entity portal to manage, suspend, and monitor their affiliated Navigators.

Update Organization Information



Navigator Grantees can update their hours of operation and business address on the entity portal for consumers.

Individual Navigators

Activate Entity Portal Profile



Individual Navigators can activate their entity portal after their Navigator Grantee lead registers them as an affiliated Navigator on the entity portal.

Assist and Manage Consumers



Navigators can use the entity portal to manage a list of consumers who they are assisting and help consumers fill out an application.

Our team will provide a **live demo** of the entity portal during the monthly meeting on **Thursday, October 10.**

TIMELINE AND RESOURCES

KEY PROGRAM ACTIVITIES, MILESTONES, AND DEADLINES

The following outlines the key activities and dates for Navigator Grantees and individual Navigators participating in Georgia Access.

	2024				2025
	Sept	Oct	Nov	Dec	Jan
Certification Training					
Georgia Access certification training is available – Training is Live!					
Deadline to complete certification training			11/1		
Office Hours					
Office Hour Sessions for Navigator Grantees	9/19	10/17	11/14	12/12	1/16
Navigator Grant Payments					
Remaining 80% of grant distributed in 10 equal payments*					
Report Submission Requirements					
Monthly report due**			11/15	12/15	1/15
Quarterly report due**				12/15	
Assist Consumers					
Contact Center is live		10/1			
Entity Portal launches		10/15			
Navigators begin helping consumers			11/1		

*Continues monthly through July 2025.

**If the report deadline falls on a weekend, the report is due the last weekday prior to the deadline.

RESOURCES



Georgia Access Website | <https://georgiaaccess.gov/for-partners/navigators/>

Information on the Georgia Access Navigator Program



OCI Website | oci.georgia.gov/agents-agency-licensing/navigators-and-georgia-access-specialists-cacs

Information on State of Georgia licensure requirements and the application process.



Sircon | sircon.com/landingPages/states/georgia/content.jsp

Apply for a license, check the status of a license or application, and update contact information.



Georgia Access Certification | certification.georgiaaccess.gov

Access the Georgia Access certification training and final assessment.



Navigator Inbox | Navigators@GeorgiaAccess.ga.gov



Georgia Access Contact Center | 1-888-312-4237

The Contact Center will go live on starting October 1, 2024.



Q&A

APPENDIX

GEORGIA ACCESS CERTIFICATION REQUIREMENTS

Navigators who would like to support Georgia consumers for PY 2025 are required to complete the Georgia Access certification training and pass the accompanying assessment.

- 1 Access the certification training**
The course and assessment is available on the Georgia Access Learning Management System (LMS). Access the LMS at certification.georgiaaccess.gov
- 2 Complete certification training**
The course includes modules on the Navigator role, Georgia Access Policies & Procedures, and Privacy & Security. The State recommends setting aside three (3) hours to complete the certification training.
- 3 Pass the final assessment**
A minimum score of 80% is required to pass the final assessment; a maximum of three (3) attempts will be permitted.
- 4 Submit the Certification Agreement**
As part of the final assessment, Navigators attest that they will adhere to all requirements and policies in the Georgia Access Certification Agreement.
- 5 Obtain Georgia Access certification certificate**
Navigators who pass the final assessment are provided a printable, downloadable PDF certificate.

STATE OF GEORGIA NAVIGATOR LICENSE REQUIREMENTS

Navigators are required to obtain and maintain licensure to assist consumers on Georgia Access.

Complete the below steps to apply for a State of Georgia Navigator license



Visit <https://oci.georgia.gov/agents-agency-licensing/navigators> to review the requirements for Navigator licensure.



Log in to Sircon at <https://www.sircon.com/landingPages/states/georgia/content.jsp> to apply.* Navigators are required to complete pre-licensing training and assessment to receive a license.



Upload the Georgia Access certificate verifying completion of certification.



Upload the completed and signed Licensure Affiliation Form. The form must be signed by the affiliated Navigator Grantee organization to confirm affiliation.



Upload the completed and notarized Citizenship Affidavit and legible copy of applicants ID.



Submit \$55 payment fee.



After submitting the application, follow the instructions to register for fingerprinting which is a requirement for a license.

**Navigators that received a license for PY 2024 should submit a renewal application and are still required complete Georgia Access certification training.*