

### Purpose

This tip sheet guides Care Coordinators (CC) on strategies for reaching members and encouraging them to complete an HRA.

### Prepare for Member Engagement: Key Steps for Successful Interaction

Before reaching out to a member, please take a moment to familiarize yourself with their background. The following tips and resources can help guide your conversation and ensure smooth and informed interaction.

Assessments should be scheduled early enough to meet the required 30/60 or 365-day deadlines and to respect the members' time and commitments.

- Giving only short notice—like two days—can lead to missed appointments and deadlines.
- To engage effectively, plan, consider the member's availability, and stick to the timelines.

### REMINDER: The CC must complete four actionable attempts to reach members:

The CC must complete a total of four actionable outreach attempts to offer an assessment.

- The first three attempts must be made using phone, email, or letter, and must occur on different days and at various times to maximize the chance of reaching the member.
- The fourth and final attempt must be a mailed UTR Member Support Plan Letter sent to the members.

### UNABLE TO REACH

The CC should review additional resources to locate member contact information, including the following:

- County Financial Worker
- Primary Care Provider (MD, NP, PA) (PCP)
- Pharmacy
- MMIS
- Waiver CM
- Primary Care Clinic (PCC)
- Service Providers (Homecare, CFSS, DME)
- MNITS

Attempts to obtain alternative member contact information must be documented. An attempt to obtain an alternative member contact information is **NOT** considered an outreach attempt.

### REFUSAL

When the Care Coordinator contacts the member or someone authorized to speak on the member's behalf.) There is clear communication that the member does not wish to participate in an assessment after being given the opportunity:

- **Explore the reason:** Ask open-ended questions to understand their concerns or barriers.
- **Build trust:** Be consistent, approachable, and explain your role clearly.
- **Reframe the assessment:** Highlight benefits, offer flexible formats, and use **motivational interviewing**.
- **Engage support systems:** With consent, involve family, caregivers, or trusted providers.
- **Stay patient:** Don't take it personally, keep the door open, and check in periodically.