

OUTREACH/IN-REACH ACTIVITY MATRIX		
Who's Responsible?	In-Reach (Patients) Tasks	Outreach (Members) Tasks
Clinic Care Teams	For new and established patients --- Generate i2i Huddle report; Huddle; conduct robust confirmation calls; manage patient panels; perform annual wellness visit (physical)/CHDP; use appropriate codes; perform SHA (age-appropriate, annually); print out anticipatory guidance; recall no-show patients; recall patients with abnormal labs/clinically significant follow up	Designated Care Team Staff: Schedule Non-Engaged Members (not new members) by documenting in Enrollment Manager as directed by Center Manager, Supervisors, Leaders. Center Managers will provide feedback to Membership Services Director on O & E staff progress at sites.
Health Educators	Conduct group classes; recall patients with gaps in care for diabetic labs CDC-HT; CDC-N; MPM-ACE; and MPM-Diuretics (standing orders); Recall patients who have not had an annual wellness visit (prioritize CHDPs) in the past 12 months (lists retrieved from Health Plans portal for these measures) Note: Documentation in NextGen only.	N/A
Patient Services Center	Schedule appointments in a timely manner for all patients	Conduct outreach; schedule appointments from the Enrollment Manager list from designated health plans for members assigned within the last 0-90 days. If all 0-90 day New Members have been contacted, available staff time should be concentrated on Non-Engaged members with a focus on sites that have available access.
Outreach and Enrollment Staff	Recall patients who are identified as uninsured and pursue enrollment of health coverage	Conduct outreach; schedule appointments from the Enrollment Manger list from designated health plans for members assigned within 91-120 days and Non-Engaged members as a second priority. Health coverage schedules are blocked for 4 hours weekly. Documentation will be done in Enrollment Manager. This time commitment will be allocated in full or part by the O & E Team Leader. O & E Team members will also communicate with Center Managers on weekly progress.

Definitions:

For all centers, Goal 1 CLT will be around improving the % of annual wellness visits over total medical visits

Schedule Annual Wellness Visits under Preventive Visit event

Annual Wellness Visit may include an IHA (new member); annual physical for an adult and CHDP visit for children; Annual Wellness Visit for Medicare patients may only be done by MDs. More details to follow for Medicare.

Outreach - Members ; In-Reach - Patients

Outreach activities are currently focused on Health Plan of San Joaquin and Partnership Health Plan members

Documentation of outreach/inreach contacts report by participating employees will be provided to appropriate managers.

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