

# Federally-facilitated Marketplace Assister Curriculum: Customer Service Standards and Community Outreach

U.S. DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services

Center for Consumer Information & Insurance  
Oversight

**November 2016**

## Table of Contents

Customer Service Standards and Community Outreach .....	1
Course Introduction Module .....	1
Course Title .....	1
Course Overview .....	2
Customer Service Basics Module.....	4
Introduction to Customer Service Basics and Best Practices .....	4
Dealing with Complicated Situations.....	5
Knowledge Check.....	7
Emotional Consumers.....	8
Consumer Opinions.....	10
Consumers with Cognitive Impairments or Intellectual Disabilities.....	11
Consumers Who Just Want to Talk.....	13
Remember these best practices: .....	13
Consumers with Limited English Proficiency (LEP) and Resources for Providing Linguistically Appropriate Services .....	14
Knowledge Check.....	15
Key Points.....	17
Community Outreach and Strategies .....	18
Introduction .....	18
Description of Community Outreach.....	19
Knowledge Check.....	21
Your Role in Community Outreach .....	23
Best Practices for Conducting Outreach.....	25
Knowledge Check.....	27
Steps to Build a Successful Community Outreach Strategy .....	29
Identify Your Population of Focus.....	30
Identify other community programs and organizations.....	31
Identify Materials Needed to Approach Consumers .....	33
Knowledge Check.....	34
Identify Your Strengths And Weaknesses.....	36

Plan for Outreach.....	38
Get Buy-In .....	39
Track, Monitor, Evaluate, and Refine Your Outreach Activities .....	40
Keeping Up with Marketplace News and Information .....	42
Knowledge Check.....	43
Key Points.....	44
Customer Service Standards and Community Outreach Resources .....	45

## Customer Service Standards and Community Outreach

### Course Introduction Module

Customer Service Standards and Community Outreach Exit

**Course Introduction** Page 1 of 3

WELCOME TO THE  
**CUSTOMER SERVICE STANDARDS  
AND COMMUNITY OUTREACH  
COURSE**

 

[Text Description of Image or Animation](#)

 Health Insurance Marketplace NEXT >

Menu Help Glossary Resources

### Course Title

Welcome to the Customer Service Standards and Community Outreach Course (Health Insurance Marketplace)

The screenshot shows a web-based course interface titled "Customer Service Standards and Community Outreach". At the top right are links for "Exit" and "Page 2 of 3". Below the title is a "Course Introduction" section with a "Course Overview" heading. The overview text welcomes users to a course on customer service and community outreach, noting its relevance to hard-to-reach populations. It lists topics like delivering friendly service, handling challenging situations, planning outreach, and developing relationships. A note specifies that "you" refers to assisters like Navigators and Non-Navigators. Another note states that while the lesson is not required for certified application counselors, it is useful for them. A "NEXT" button at the bottom indicates the user has just started the course.

## Course Overview

Welcome to the course on Customer Service Standards and Community Outreach! This course provides you with information about how to interact with consumers and conduct effective community outreach, especially for hard-to-reach populations.

The course includes information on:

- Delivering friendly, objective, and impartial customer service
- Handling challenging situations with consumers
- Planning community outreach activities
- Developing relationships with community organizations

In this lesson, "you" refers to the following types of assisters:

- Navigators in Federally-facilitated Marketplace, including State Partnership Marketplaces and FFMs where the state performs plan management functions
- Non-Navigator assistance personnel in the Federally-facilitated Marketplace, including State Partnership Marketplaces and the FFMs where the state performs plan management functions

- Non-Navigator assistance personnel in State-based Marketplaces and State Partnership Marketplaces that are funded with Marketplace Establishment Grant funds.

Note: In some cases, "you" is also used to refer to a consumer, but it should be clear when this is the intended meaning.

This lesson is not a required lesson for certified application counselors in the Federally-facilitated Marketplace or State Partnership Marketplaces. However, the basic health insurance information included in this lesson will be useful for certified application counselors to know as they help consumers enroll in health coverage through the Marketplace. This course concludes with an exam.

## Customer Service Basics Module

**Customer Service Standards and Community Outreach** [Exit](#)

**Customer Service Basics** Page 1 of 10

### Introduction to Customer Service Basics and Best Practices

You play an important role in making sure consumers get respectful, appropriate, culturally competent, and courteous assistance when they're looking for coverage through an FFM.

This training will familiarize you with customer service basics and best practices. You can use these best practices to share information with consumers about the FFMs, answer their health coverage questions, and help consumers select a health plan.

This training will provide you with the skills to:

- Identify ways to provide friendly, objective, and impartial customer service
- Identify effective ways to handle difficult situations with consumers

*Click **NEXT** to continue.*



[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

### Introduction to Customer Service Basics and Best Practices

You play an important role in making sure consumers get respectful, appropriate, culturally competent, and courteous assistance when they're looking for coverage through an FFM.

This training will familiarize you with customer service basics and best practices. You can use these best practices to share information with consumers about the FFMs, answer their health coverage questions, and help consumers select a health plan.

This training will provide you with the skills to:

- Identify ways to provide friendly, objective, and impartial customer service
- Identify effective ways to handle difficult situations with consumers

**Customer Service Standards and Community Outreach**

**Customer Service Basics**

**Dealing with Complicated Situations**

The majority of the consumers that you'll serve will be grateful for your help. Some consumers may be frustrated with the process by the time they reach you. They may have faced other challenges that affect the way that they interact with you. You should be able to identify consumers' emotions or circumstances to provide appropriate support. As a best practice, try not to take things personally, and ask for a supervisor's or colleague's help when needed.

Some of the challenging situations that you may face with consumers include when they:

- Are emotional
- Complain about health reform
- Have cognitive impairments or intellectual disabilities
- Just want to talk
- Have limited English proficiency (LEP)

Providing appropriate support may also involve informing consumers about how to file a formal complaint. Depending on the type of the complaint, it can be handled by either the state's Department of Insurance (or another state agency), the state Medicaid office, or the Centers for Medicare & Medicaid Services (CMS).

You should also advise consumers that they can file a complaint directly with their health insurance company.



Page 2 of 10

Exit

Menu Help Glossary Resources BACK NEXT

## Dealing with Complicated Situations

The majority of the consumers that you'll serve will be grateful for your help. Some consumers may be frustrated with the process by the time they reach you. They may have faced other challenges that affect the way that they interact with you. You should be able to identify consumers' emotions or circumstances to provide appropriate support. As a best practice, try not to take things personally, and ask for a supervisor's or colleague's help when needed.

Some of the challenging situations that you may face with consumers include when they:

- Are emotional
- Complain about health reform
- Have cognitive impairments or intellectual disabilities
- Just want to talk
- Have limited English proficiency (LEP)

Providing appropriate support may also involve informing consumers about how to file a formal complaint. Depending on the type of the complaint, it can be handled by either the state's Department of Insurance (or another state agency), the state Medicaid office, or the Centers for Medicare & Medicaid Services (CMS).

You should also advise consumers that they can file a complaint directly with their health insurance company.

The screenshot shows a web-based learning activity titled "Customer Service Standards and Community Outreach". The specific section is "Customer Service Basics" and the page is "Page 3 of 10". The title of the activity is "Knowledge Check". The question asks: "You serve consumers from a wide variety of backgrounds. What are ways you can provide friendly and impartial customer service?". It instructs the user to "Select all that apply" and click "Check Your Answer". Below the question is a list of four options: A. Be aware of consumers' emotions and specific circumstances; B. Try not to take things some consumers may say personally; C. Avoid asking your supervisor for help; D. Ask your supervisor for help if needed. At the bottom of the activity area is a blue button labeled "Check Your Answer". Below the activity area, a message says "Click through the activity to enable the NEXT button". At the very bottom are navigation buttons: "Menu", "Help", "Glossary", "Resources", "< BACK", and "NEXT >".

## Knowledge Check

**You serve consumers from a wide variety of backgrounds. What are ways you can provide friendly and impartial customer service?**

Select **all that apply**.

- A. Be aware of consumers' emotions and specific circumstances.
- B. Try not to take things some consumers may say personally.
- C. Avoid asking your supervisor for help.
- D. Ask your supervisor for help if needed.

**Feedback:** The correct answers are A, B, and D. You should be aware of consumers' emotions and specific circumstances, not take things that consumers say personally, and ask your supervisor for help if needed

**Customer Service Standards and Community Outreach**

**Customer Service Basics**

**Emotional Consumers**

You may have to deal with consumers who are emotional. They may be angry, sad, hopeless, or fearful. You should always be patient and get help from your peers or supervisor, as needed.

In these situations, there are some best practices to remember:

- Acknowledge but don't agree with or encourage consumers' emotions.
- Stick to the facts and avoid sharing your opinion.
- Don't argue, but instead try to see the situation from consumers' perspectives and remember that you both share the same goal of finding positive outcomes.
- Listen attentively to consumers.
- Show empathy and let consumers know that you share their goals.
- Focus your responses on what you can do rather than what you can't do.
- Take a deep breath and look for a way to help consumers if you feel yourself getting upset by the situation.
- Always remain calm and be patient.

Here are some [additional best practices](#) when dealing with emotional consumers.

Click on the BLUE links(s) to enable NEXT button

[Menu](#)   [Help](#)   [Glossary](#)   [Resources](#)

◀ BACK   [NEXT](#) ▶



## Emotional Consumers

You may have to deal with consumers who are emotional. They may be angry, sad, hopeless, or fearful. You should always be patient and get help from your peers or supervisor, as needed.

In these situations, there are some best practices to remember:

- Acknowledge but don't agree with or encourage consumers' emotions.
- Stick to the facts and avoid sharing your opinion.
- Don't argue, but instead try to see the situation from consumers' perspectives and remember that you both share the same goal of finding positive outcomes.
- Listen attentively to consumers.
- Show empathy and let consumers know that you share their goals.
- Focus your responses on what you can do rather than what you can't do.
- Take a deep breath and look for a way to help consumers if you feel yourself getting upset by the situation.
- Always remain calm and be patient.

Here are some additional best practices when dealing with emotional consumers.

**Additional best practices when dealing with emotional consumers**

- Allow consumers to say what they're feeling. If consumers get off topic, try to bring the discussion back to the topic at hand.
- Tell verbally abusive consumers in a calm way that you'd like to work together to resolve any issues. You might also recommend taking a short break to calm down before resuming your discussion.
- Keep a calm tone of voice and slow your rate of speech to help de-escalate the situation.
- Follow established procedures for reporting immediate harm or danger if faced with a situation where consumers are particularly difficult or may become violent.

**Customer Service Standards and Community Outreach** [Exit](#)

**Customer Service Basics** Page 5 of 10

### Consumer Opinions

There may be instances when consumers will share opinions, either positive or negative, about the Affordable Care Act.

**Remember the following best practices:**

- Let consumers know that you'll do your best to help resolve their concerns or clear up any misconceptions by providing accurate and up-to-date information.
- Keep the conversation fact-based and refrain from arguing.
- Answer any questions about health care reform impartially and correct any misunderstandings or misinformation.
- Don't agree or get into a discussion of complaints about health care reform; try to stick to talking about health coverage options.
- Be aware of body language and facial expressions to ensure you're not giving the wrong message.



[Menu](#) [Help](#) [Glossary](#) [Resources](#) [\*\*< BACK\*\*](#) [\*\*NEXT >\*\*](#)

## Consumer Opinions

There may be instances when consumers will share opinions, either positive or negative, about the Affordable Care Act.

**Remember the following best practices:**

- Let consumers know that you'll do your best to help resolve their concerns or clear up any misconceptions by providing accurate and up-to-date information.
- Keep the conversation fact-based and refrain from arguing.
- Answer any questions about health care reform impartially and correct any misunderstandings or misinformation.
- Don't agree or get into a discussion of complaints about health care reform; try to stick to talking about health coverage options.

Be aware of body language and facial expressions to ensure you're not giving the wrong message.

The screenshot shows a web-based training module titled "Customer Service Standards and Community Outreach". The specific section displayed is "Customer Service Basics" and the page number is "Page 6 of 10". The title of the section is "Consumers with Cognitive Impairments or Intellectual Disabilities". The text in the section discusses how to interact with consumers who have cognitive impairments or intellectual disabilities, emphasizing that they should be the primary source of information and decision-making about health coverage. It also provides a list of tips for interacting with these consumers.

You may meet with some consumers who have cognitive impairments or intellectual disabilities. Remember that you should avoid asking consumers if they have cognitive impairments or intellectual disabilities, or saying that you think they do. To the extent possible, consumers seeking health coverage should be the primary source of information and decision-making about health coverage, even if consumers are accompanied by caregivers, authorized representatives, guardians, or family members. When another person is authorized to represent a consumer, it's a good idea to try to make sure the consumer is the focus of the discussion and participates in the conversation to the greatest extent possible. You should not assume that people with disabilities have Medicaid, or that they don't work.

Other tips to keep in mind:

- Check with consumers frequently to make sure that they understand the information that you're sharing with them.
- Don't address or make eye contact only with a person that accompanied a consumer with a cognitive impairment or intellectual disability. The additional person is often present to help the consumer with understanding health coverage options and to assist in the eligibility and enrollment process.
- Don't assume that slurred speech is a sign of substance abuse, cognitive impairment, or intellectual disability; it may be a result of medication, treatment, or another kind of health issue.
- Make sure consumers with disabilities have access to reasonable accommodations while you're helping them.
- Be patient. Your role is to help consumers make the right health care choices for themselves and their families. You may be their only resource for knowledgeable, unbiased information.
- Consider seeking out resources from other organizations that specialize in helping consumers with cognitive impairments or intellectual disabilities.

Navigation buttons at the bottom include "Menu", "Help", "Glossary", "Resources", "BACK", and "NEXT".

## Consumers with Cognitive Impairments or Intellectual Disabilities

You may meet with some consumers who have cognitive impairments or intellectual disabilities. Remember that you should avoid asking consumers if they have cognitive impairments or intellectual disabilities, or saying that you think they do. To the extent possible, consumers seeking health coverage should be the primary source of information and decision-making about health coverage, even if consumers are accompanied by caregivers, authorized representatives, guardians, or family members. When another person is authorized to represent a consumer, it's a good idea to try to make sure the consumer is the focus of the discussion and participates in the conversation to the greatest extent possible. You should not assume that people with disabilities have Medicaid, or that they don't work.

Other tips to keep in mind:

- Check with consumers frequently to make sure that they understand the information that you're sharing with them.
- Don't address or make eye contact only with a person that accompanied a consumer with a cognitive impairment or intellectual disability. The additional person is often present to help the consumer with understanding health coverage options and to assist in the eligibility and enrollment process.

- Don't assume that slurred speech is a sign of substance abuse, cognitive impairment, or intellectual disability; it may be a result of medication, treatment, or another kind of health issue.
- Make sure consumers with disabilities have access to reasonable accommodations while you're helping them.
- Be patient. Your role is to help consumers make the right health care choices for themselves and their families. You may be their only resource for knowledgeable, unbiased information.
- Consider seeking out resources from other organizations that specialize in helping consumers with cognitive impairments or intellectual disabilities.

**Customer Service Standards and Community Outreach** [Exit](#)

**Customer Service Basics** Page 7 of 10

### Consumers Who Just Want to Talk

You may meet with consumers who simply want to talk about other things or move your discussion off topic. Try to return their attention to the Marketplace and how you can help them with specific needs and questions about health coverage. Avoid discussing unrelated topics.

**Remember these best practices:**

- If consumers have a specific need or question related to health coverage, respond in the way that you usually would.
- If there isn't a specific need or question related to health coverage, you should tell consumers about the services that you provide and could also (if you wish) suggest that another type of organization or individual might be able to help with other issues (e.g., a social worker).
- If consumers continue to discuss topics unrelated to health coverage, you should politely let them know that assistance with these topics is not your role, and that it's important to focus the conversation on health coverage.
- If you're unsure how to handle consumers who don't have a specific need or question related to health coverage, encourage them to return to your office at another time with any specific health coverage related needs or questions, then conclude the meeting.



[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

### Consumers Who Just Want to Talk

You may meet with consumers who simply want to talk about other things or move your discussion off topic. Try to return their attention to the Marketplace and how you can help them with specific needs and questions about health coverage. Avoid discussing unrelated topics.

**Remember these best practices:**

- If consumers have a specific need or question related to health coverage, respond in the way that you usually would.
- If there isn't a specific need or question related to health coverage, you should tell consumers about the services that you provide and could also (if you wish) suggest that another type of organization or individual might be able to help with other issues (e.g., a social worker).
- If consumers continue to discuss topics unrelated to health coverage, you should politely let them know that assistance with these topics is not your role, and that it's important to focus the conversation on health coverage.
- If you're unsure how to handle consumers who don't have a specific need or question related to health coverage, encourage them to return to your office at another time with any specific health coverage related needs or questions, then conclude the meeting.

**Customer Service Standards and Community Outreach**

**Customer Service Basics**

**Consumers with Limited English Proficiency (LEP) and Resources for Providing Linguistically Appropriate Services**

You may work with consumers who have LEP. Your organization should have staff members who can speak your consumers' preferred language(s) or be able to get local interpreters. If none of these options are available and/or if you work for another type of assister organization (e.g., certified application counselors), you should refer consumers to the Marketplace Call Center.

"[Getting Help in a Language Other than English](#)" is a CMS fact sheet written in the major languages spoken in the United States (U.S.), with instructions for calling the Marketplace Call Center. A print-ready version is available on [Marketplace.CMS.gov](#).

If you can't secure local support, and your consumers speak a language that's not represented through the Marketplace Call Center, you might be able to find additional resources from the [HHS Office of Minority Health Resource Library](#). If you're a new user, you'll have to complete a quick registration process and sign in with your username and password.

**Other Language Resources**

Chinese French French Creole German Gujarati Hindi Korean Polish Portuguese Russian Spanish Tagalog Vietnamese



Menu Help Glossary Resources ◀ BACK ▶ NEXT

## Consumers with Limited English Proficiency (LEP) and Resources for Providing Linguistically Appropriate Services

You may work with consumers who have LEP. Your organization should have staff members who can speak your consumers' preferred language(s) or be able to get local interpreters. If none of these options are available and/or if you work for another type of assister organization (e.g., certified application counselors), you should refer consumers to the Marketplace Call Center.

"[Getting Help in a Language Other than English](#)" is a CMS fact sheet written in the major languages spoken in the United States (U.S.), with instructions for calling the Marketplace Call Center. A print-ready version is available on [Marketplace.CMS.gov](#).

If you can't secure local support, and your consumers speak a language that's not represented through the Marketplace Call Center, you might be able to find additional resources from the [HHS Office of Minority Health Resource Library](#). If you're a new user, you'll have to complete a quick registration process and sign in with your username and password.

The screenshot shows a knowledge check activity titled "Customer Service Basics" on page 9 of 10. The scenario describes a consumer named Guang who is agitated because he has been waiting for 30 minutes and feels he has other things to do. The question asks for ways to address his concerns, with instructions to select all that apply. Below the question is a list of four options, each preceded by a checkbox. A "Check Your Answer" button is at the bottom left, and a note says to click through the activity to enable the NEXT button. Navigation buttons for Menu, Help, Glossary, Resources, BACK, and NEXT are at the bottom.

**Customer Service Basics**

Page 9 of 10

**Knowledge Check**

You scheduled an appointment with Guang, who is sitting in the waiting room. While you wrap up your meeting with another consumer, you ask him to wait five more minutes and give him some Marketplace materials to read. This appears to agitate Guang, who shouts, "I've been waiting here for 30 minutes already and I have other things to do this afternoon. I came here because I really need to speak with someone. I don't understand Obamacare or how it will actually help me."

**What are some ways to address his concerns?**

Select **all that apply** and then click **Check Your Answer**.

A. Stick to the facts but also share your opinions about health care reform.  
 B. Let Guang know that you both share the same goal of finding positive outcomes.  
 C. Without arguing, try to see the situation from Guang's perspective, always remaining calm and patient.  
 D. Don't agree with or encourage Guang's emotions.

**Check Your Answer**

Click through the activity to enable the NEXT button

Menu   Help   Glossary   Resources   < BACK   **NEXT >**

## Knowledge Check

You scheduled an appointment with Guang, who is sitting in the waiting room. While you wrap up your meeting with another consumer, you ask him to wait five more minutes and give him some Marketplace materials to read. This appears to agitate Guang, who shouts, "I've been waiting here for 30 minutes already and I have other things to do this afternoon. I came here because I really need to speak with someone. I don't understand Obamacare or how it will actually help me."

### What are some ways to address his concerns?

Select **all that apply**.

- A. Stick to the facts but also share your opinions about health care reform.
- B. Let Guang know that you both share the same goal of finding positive outcomes.
- C. Without arguing, try to see the situation from Guang's perspective, always remaining calm and patient.
- D. Don't agree with or encourage Guang's emotions.

**Feedback:** The correct answers are B, C, and D. In this scenario, it's best to stick to the facts without sharing your own opinions about health care reform, let Guang know that

you both share the same goals, and try to see the situation from his perspective without encouraging his emotions.

**Customer Service Standards and Community Outreach** [Exit](#)

**Customer Service Basics** Page 10 of 10

### Key Points

- You play an important role in making sure that consumers get friendly, objective, culturally appropriate, and impartial help when they're exploring options for health coverage through the Marketplace.
- Although consumers may come to you with a variety of challenging situations, you should always treat them with respect and consider applying the best practices shared in this training.
- You should recognize when you need to refer consumers to other types of assistance, or to another colleague or supervisor.
- Check with consumers frequently to make sure that they understand the information you're presenting. Know what resources are available to you when dealing with complicated situations.

*Click **NEXT** to continue.*



[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

### Key Points

- You play an important role in making sure that consumers get friendly, objective, culturally appropriate, and impartial help when they're exploring options for health coverage through the Marketplace.
- Although consumers may come to you with a variety of challenging situations, you should always treat them with respect and consider applying the best practices shared in this training.
- You should recognize when you need to refer consumers to other types of assistance, or to another colleague or supervisor.
- Check with consumers frequently to make sure that they understand the information you're presenting. Know what resources are available to you when dealing with complicated situations.

## Community Outreach and Strategies

**Customer Service Standards and Community Outreach** [Exit](#)

**Community Outreach and Strategies** Page 1 of 18

### Introduction

If you are a Navigator or non-Navigator assistance personnel, one of your responsibilities is to increase consumers' awareness of the Marketplaces through education and outreach activities. It's important that you understand how to connect with consumers in your community, so that you can educate them about the Marketplaces and their health coverage options.

This training will provide you with the skills to:

- Describe the goals of community outreach.
- Recognize what kind of outreach is both appropriate and possible.
- List the steps to create an effective outreach work plan.
- Describe examples of outreach activities that might be effective in your community.

Click **NEXT** to continue.



[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

### Introduction

If you are a Navigator or non-Navigator assistance personnel, one of your responsibilities is to increase consumers' awareness of the Marketplaces through education and outreach activities. It's important that you understand how to connect with consumers in your community, so that you can educate them about the Marketplaces and their health coverage options.

This training will provide you with the skills to:

- Describe the goals of community outreach.
- Recognize what kind of outreach is both appropriate and possible.
- List the steps to create an effective outreach work plan.
- Describe examples of outreach activities that might be effective in your community.

**Customer Service Standards and Community Outreach** [Exit](#)

**Community Outreach and Strategies** Page 2 of 18

### Description of Community Outreach

Community outreach involves providing information and services to consumers in your area, and can help you connect with hard-to-reach consumers.

The goals of community outreach are to:

- Increase awareness about the Affordable Care Act, including the Marketplaces and requirements for individuals and employers.
- Improve understanding about the health coverage options available through the Marketplaces and where consumers can go for help.
- Give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer health coverage to their employees through the Marketplaces.

Outreach activities should be tailored to address the specific needs of your community. It's also important to understand the difference between outreach and solicitation. You may not contact consumers directly to help them apply for or enroll in Marketplace coverage if they didn't initiate, request, or give prior consent to the contact, unless you or your Assister organization has a pre-existing relationship with the consumer. This prohibition on solicitation doesn't apply to public education and outreach activities. You and your Assister organization must also comply with any other state and federal law that may apply to directly contacting consumers.

Click here for some [examples of community outreach activities](#).

Click on the BLUE links(s) to enable NEXT button

[Menu](#) [Help](#) [Glossary](#) [Resources](#)

[!\[\]\(0c960be1d8eb5c895b7cfaefee87832a\_img.jpg\) BACK](#) [NEXT >](#)

## Description of Community Outreach

Community outreach involves providing information and services to consumers in your area, and can help you connect with hard-to-reach consumers.

The goals of community outreach are to:

- Increase awareness about the Affordable Care Act, including the Marketplaces and requirements for individuals and employers.
- Improve understanding about the health coverage options available through the Marketplaces and where consumers can go for help.
- Give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer health coverage to their employees through the Marketplaces.

Outreach activities should be tailored to address the specific needs of your community. It's also important to understand the difference between outreach and solicitation. You may not contact consumers directly to help them apply for or enroll in Marketplace coverage if they didn't initiate, request, or give prior consent to the contact, unless you or your Assister organization has a pre-existing relationship with the consumer. This prohibition on solicitation doesn't apply to public education and outreach activities. You and your Assister organization must also comply with any state and federal law that may apply to directly contacting consumers.

Examples of community outreach activities:

- Participating in radio programs and conducting “live” interviews.
- Including information about health coverage in a state's energy assistance program mailing.
- Engaging the United States Department of Agriculture (USDA) Extension programs.
- Distributing outreach materials to local organizations, like community centers and libraries.
- Setting up tables at community events to pass out information, talking to consumers, and advising them of the services that your organization provides to the public.
- Outreach to community organizations to let them know that you're available to help.

Going door-to-door to conduct general consumer education or outreach (without soliciting application or enrollment assistance) letting the community know that you're available to provide information and assistance.

The screenshot shows a knowledge check activity titled "Knowledge Check". The instructions state: "Connie is an Assister conducting outreach activities in a new community." and "Which of the following goals are important to her outreach efforts? Select all that apply and then click Check Your Answer." Below are four options:

- A. Give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer health coverage to their employees through the Marketplaces.
- B. Help ensure that her organization enrolls more individuals than any other similar organizations in her community.
- C. Increase awareness about the Affordable Care Act, including the Marketplaces and requirements for individuals and employers.
- D. Improve understanding about the health coverage options available through the Marketplaces and where consumers can go for help.

A blue button labeled "Check Your Answer" is visible. At the bottom, a note says "Click through the activity to enable the NEXT button". Navigation buttons include "Menu", "Help", "Glossary", "Resources", "BACK", and "NEXT".

## Knowledge Check

Connie is an Assister conducting outreach activities in a new community.

### Which of the following goals are important to her outreach efforts?

Select all that apply.

- A. Give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer health coverage to their employees through the Marketplaces.
- B. Help ensure that her organization enrolls more individuals than any other similar organizations in her community.
- C. Increase awareness about the Affordable Care Act, including the Marketplaces and requirements for individuals and employers.
- D. Improve understanding about the health coverage options available through the Marketplaces and where consumers can go for help.

**Feedback:** The correct answers are A, C, and D. Connie should give consumers information that will help them decide whether to enroll in health coverage for themselves and/or offer health coverage to their employees through the Marketplaces. In addition, she should help increase awareness about the Affordable Care Act requirements for

individuals and employers. She should also help improve understanding in the community about health coverage options and how to get help through the Marketplaces.

## Customer Service Standards and Community Outreach

Community Outreach and Strategies

Your Role in Community Outreach

If you're a navigator, you're responsible for building relationships in the community. These relationships will be helpful as you plan your community outreach activities.

As part of community outreach, you should:

- Use knowledge about your community to tailor information and services to its specific needs.
- Act as a resource where consumers can get free and unbiased information about getting health coverage.
- Plan events that provide information about the FFMs, health coverage options, and the assistance you and other FFM-approved organizations provide.
- Reach out to organizations in your community to further spread your message.

Know that special considerations apply when you work with local agents and brokers. CMS guidance on this topic is available at <https://marketplace.cms.gov/technical-assistance-resources/agents-and-brokers-guidance-for-assisters.PDF>. You should connect with local coalitions to find out what events and outreach activities they have planned and coordinate efforts. Many communities already have partnerships and coalitions to increase awareness about health coverage options available through the Marketplaces.

Remember that it's your job to help consumers identify and enroll in the coverage that's best for them.

Page 4 of 18

Exit



Menu   Help   Glossary   Resources   < BACK   NEXT >

## Your Role in Community Outreach

If you're a navigator, you're responsible for building relationships in the community. These relationships will be helpful as you plan your community outreach activities.

As part of community outreach, you should:

- Use knowledge about your community to tailor information and services to its specific needs.
- Act as a resource where consumers can get free and unbiased information about getting health coverage.
- Plan events that provide information about the FFMs, health coverage options, and the assistance you and other FFM-approved organizations provide.
- Reach out to organizations in your community to further spread your message.

Know that special considerations apply when you work with local agents and brokers. CMS guidance on this topic is available at <https://marketplace.cms.gov/technical-assistance-resources/agents-and-brokers-guidance-for-assisters.PDF>. You should connect with local coalitions to find out what events and outreach activities they have planned and coordinate efforts. Many communities already have partnerships and coalitions to increase awareness about health coverage options available through the Marketplaces.

Remember that it's your job to help consumers identify and enroll in the coverage that's best for them.

The screenshot shows a web page titled "Customer Service Standards and Community Outreach". The main content area is titled "Community Outreach and Strategies" and contains a section titled "Best Practices for Conducting Outreach". A note below states: "When conducting outreach, you should consider following these best practices:". A bulleted list follows:

- Make yourself available to provide in-person assistance to members of your community.
- Consider the needs of your community when you choose how and where you'll conduct outreach.
- Reach out to community organizations so they know you are available to help consumers (e.g., schools, libraries, faith-based organizations, local radio programs, local newspapers, and local businesses).
- Always make consumers' privacy a priority. You can't make cold calls or send unsolicited e-mails to solicit or provide application or enrollment assistance. You may call or email a consumer to solicit or provide application or enrollment assistance only if you have a pre-existing relationship with the consumer or if the consumer has initiated, requested, or given prior consent to the contact, and only if you have complied with all other applicable state and federal laws.
- Use the social media tools available at [Marketplace.CMS.gov](#) to conduct outreach and bring awareness about health coverage to your community. Remember, it's not appropriate to contact specific individuals through social media to solicit or provide application or enrollment assistance, unless you have a pre-existing relationship with the individual or they have initiated, requested, or given prior consent to the contact, and you have complied with all other applicable state and federal laws.
- If consumers want to refer friends or relatives to you, you may give your contact information (e.g., a business card) for them to share. Referred friends or relatives should generally contact you directly, unless you can confirm that a third party who shares consumer contact information with you has obtained the consumer's consent to share his or her PII with you or your organization so you can contact the consumer (refer to the guidance available [here](#) for additional information).

A note at the bottom of the list states: "Most important, while you may conduct door-to-door educational outreach, you MUST NOT solicit or offer application or enrollment assistance by going door-to-door to consumers who have not initiated the contact or with whom you do not have a prior relationship."

At the bottom of the page are navigation links: "Menu", "Help", "Glossary", "Resources", "< BACK", and "NEXT >".

## Best Practices for Conducting Outreach

When conducting outreach, you should consider following these best practices:

- Make yourself available to provide in-person assistance to members of your community.
- Consider the needs of your community when you choose how and where you'll conduct outreach.
- Reach out to community organizations so they know you are available to help consumers (e.g., schools, libraries, faith-based organizations, local radio programs, local newspapers, and local businesses).
- Always make consumers' privacy a priority. You can't make cold calls or send unsolicited e-mails to solicit or provide application or enrollment assistance. You may call or email a consumer to solicit or provide application or enrollment assistance only if you have a pre-existing relationship with the consumer or if the consumer has initiated, requested, or given prior consent to the contact, and only if you have complied with all other applicable state and federal laws.
- Use the social media tools available at [Marketplace.CMS.gov](#) to conduct outreach and bring awareness about health coverage to your community. Remember, it's not appropriate to contact specific individuals through social media to solicit or provide application or enrollment assistance, unless you have a pre-existing relationship with the individual or they have initiated, requested, or given prior

consent to the contact, and you have complied with all other applicable state and federal laws.

- If consumers want to refer friends or relatives to you, you may give your contact information (e.g., a business card) for them to share. Referred friends or relatives should generally contact you directly, unless you can confirm that a third party who shares consumer contact information with you has obtained the consumer's consent to share his or her PII with you or your organization so you can contact the consumer (refer to the guidance available [here](#) for additional information).

Most important, while you may conduct door-to-door educational outreach, you MUST NOT solicit or offer application or enrollment assistance by going door-to-door to consumers who have not initiated the contact or with whom you do not have a prior relationship.

**Customer Service Standards and Community Outreach** [Exit](#)

Community Outreach and Strategies Page 6 of 18

### Knowledge Check

You and your colleague, Adrienne, are asked to plan some outreach activities to let the community know about the Affordable Care Act and your role in helping consumers get health coverage through the Marketplaces. Adrienne says that all you need is a bunch of posters, but you're not sure. You think that there may be more you can do and that perhaps the first step should be some planning. You begin to brainstorm activities that you can include in your outreach work plan.

**Which of the following are some ideas that you can use?**

Select all that apply and then click Check Your Answer.

**Check Your Answer**

A. Get a list of all community groups and set up meetings with their leaders, taking printed Marketplace materials with you.

B. Attend a local farmers market and have a table with flyers to let consumers know that you're available to help them get health coverage.

C. Go to the local hospital and doctors' offices and meet with staff to be sure that they have information about your services to give to patients who may need help.

D. Use the same design and content of your colleague's website in another state, so that you don't have to create one yourself, even though the communities are different.

Click through the activity to enable the NEXT button

[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

### Knowledge Check

You and your colleague, Adrienne, are asked to plan some outreach activities to let the community know about the Affordable Care Act and your role in helping consumers get health coverage through the Marketplaces. Adrienne says that all you need is a bunch of posters, but you're not sure. You think that there may be more you can do and that perhaps the first step should be some planning. You begin to brainstorm activities that you can include in your outreach work plan.

**Which of the following are some ideas that you can use?**

Select all that apply.

- A. Get a list of all community groups and set up meetings with their leaders, taking printed Marketplace materials with you.
- B. Attend a local farmers market and have a table with flyers to let consumers know that you're available to help them get health coverage.
- C. Go to the local hospital and doctors' offices and meet with staff to be sure that they have information about your services to give to patients who may need help.
- D. Use the same design and content of your colleague's website in another state, so that you don't have to create one yourself, even though the communities are different.

**Feedback:** The correct answers are A, B, and C. As part of your community outreach activities, you may compile a list of community organizations and meet with community leaders and health care providers in the community. You may also attend events, hand out information about the Marketplaces, or reach more consumers through the internet or social media channels. You should remember that outreach differs in each community, so you should create products specific to your community's needs.

**Customer Service Standards and Community Outreach** [Exit](#)

Community Outreach and Strategies Page 7 of 18

### Steps to Build a Successful Community Outreach Strategy

You can take the following steps to build a successful community outreach strategy:

```
graph LR; A[Identify Your Audience] --> B[Identify Your Partners]; B --> C[Identify Materials Needed to Approach Customers]; C --> D[Identify Your Strengths and Weaknesses]; D --> E[Plan For Outreach]; E --> F[Get Buy-In]; F --> G[Track, Monitor, Evaluate, and Refine Your Outreach Activities When Needed]
```

Menu Help Glossary Resources [◀ BACK](#) [NEXT ▶](#)

### Steps to Build a Successful Community Outreach Strategy

You can take the following steps to build a successful community outreach strategy:

1. Identify your audience.
2. Identify your partners.
3. Identify materials needed to approach consumers.
4. Identify your strengths and weaknesses.
5. Plan for outreach.
6. Get buy-in.
7. Track, monitor, evaluate, and refine your outreach activities when needed.

**Customer Service Standards and Community Outreach** [Exit](#)

**Community Outreach and Strategies** Page 8 of 18

### Identify Your Population of Focus

The first step in developing an effective outreach strategy is to identify your audience.

As a best practice, start by asking yourself these key questions:

- How many consumers in my community are uninsured or underinsured?
- What kind of information do these consumers need?
- How do these consumers prefer to receive information about health coverage?
- Where do these consumers live, work, study, and play?

When creating your outreach strategy, it's a good idea to take into account the different segments of consumers in your community and identify the best ways to reach and help them. You may need to use different messages and ways of delivering those messages. Messages and messengers are equally important. For example, social media may be a good way to reach 18 to 24 year-old consumers. In-person meetings or presentations at libraries or faith-based organizations, as well as written materials like brochures, may be more useful for lower income and older consumer groups.

[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)



### Identify Your Population of Focus

The first step in developing an effective outreach strategy is to identify your audience.

As a best practice, start by asking yourself these key questions:

- How many consumers in my community are uninsured or underinsured?
- What kind of information do these consumers need?
- How do these consumers prefer to receive information about health coverage?
- Where do these consumers live, work, study, and play?

When creating your outreach strategy, it's a good idea to take into account the different segments of consumers in your community and identify the best ways to reach and help them. You may need to use different messages and ways of delivering those messages. Messages and messengers are equally important. For example, social media may be a good way to reach 18 to 24 year-old consumers. In-person meetings or presentations at libraries or faith-based organizations, as well as written materials like brochures, may be more useful for lower income and older consumer groups.

The screenshot shows a web-based training module titled "Customer Service Standards and Community Outreach". The page header includes the title, a "Community Outreach and Strategies" link, a "Page 9 of 18" indicator, and an "Exit" button. The main content area is titled "Identify other community programs and organizations". It contains text about reaching out to other organizations serving the same communities, followed by two lists of questions or actions. At the bottom are navigation buttons for "Menu", "Help", "Glossary", "Resources", "BACK", and "NEXT".

Once you've determined your key audiences, it's a good idea to reach out to other programs and organizations that serve the same communities.

You should think about:

- Existing programs and resources that already support your audience.
- Ways to coordinate with other organizations to inform consumers about the availability of health coverage through the Marketplaces.

You should ask questions like:

- Do organizations in the community reach consumers from a specific ethnic or cultural group?
- What geographic regions do organizations in the community cover?
- What are the age ranges of other community organizations' audiences?
- Do community organizations have established ways of reaching their audience, like newsletters, meetings, websites, or social media accounts?
- Does your organization have existing relationships with these groups, or will you need to cultivate them?
- Do organizations in the community reach consumers with limited English proficiency (LEP) and if so, what are these consumers' preferred non-English languages?

## Identify other community programs and organizations

Once you've determined your key audiences, it's a good idea to reach out to other programs and organizations that serve the same communities.

You should think about:

- Existing programs and resources that already support your audience.
- Ways to coordinate with other organizations to inform consumers about the availability of health coverage through the Marketplaces.

You should ask questions like:

- Do organizations in the community reach consumers from a specific ethnic or cultural group?
- What geographic regions do organizations in the community cover?
- What are the age ranges of other community organizations' audiences?
- Do community organizations have established ways of reaching their audience, like newsletters, meetings, websites, or social media accounts?
- Does your organization have existing relationships with these groups, or will you need to cultivate them?

- Do organizations in the community reach consumers with limited English proficiency (LEP) and if so, what are these consumers' preferred non-English languages?

**Customer Service Standards and Community Outreach** Exit

**Community Outreach and Strategies** Page 10 of 18

### Identify Materials Needed to Approach Consumers

Now that you've identified your audience and other organizations that work with those communities, it's a good idea to reach out to other organizations to learn more about how to identify effective messages and materials.

You could start by reviewing the materials available to download on [HealthCare.gov](#) and [Marketplace.CMS.gov](#). If you can't find the information that you want, or if you want to tailor materials to meet the needs of your audience, use existing content to develop tools and materials that work with your outreach strategy.

Examples include:

- **Digital (web) Outreach:** Websites, social media channels, newsletters
- **Face-to-Face Outreach:** Brochures, flyers, presentations
- **Media Outreach:** Press releases, media kits, question-and-answer sheets

As you develop your tools and materials, consider these questions:

- Are there tested messages available?
- Are there written materials that I can repurpose, or do I need to develop new materials?
- Are materials available in languages other than English?
- What resources and channels are available to help spread my messages?

Menu Help Glossary Resources ◀ BACK NEXT ▶



## Identify Materials Needed to Approach Consumers

Now that you've identified your audience and other organizations that work with those communities, it's a good idea to reach out to other organizations to learn more about how to identify effective messages and materials.

You could start by reviewing the materials available to download on [HealthCare.gov](#) and [Marketplace.CMS.gov](#). If you can't find the information that you want, or if you want to tailor materials to meet the needs of your audience, use existing content to develop tools and materials that work with your outreach strategy.

Examples include:

- **Digital (web) Outreach:** Websites, social media channels, newsletters
- **Face-to-Face Outreach:** Brochures, flyers, presentations
- **Media Outreach:** Press releases, media kits, question-and-answer sheets

As you develop your tools and materials, consider these questions:

- Are there tested messages available?
- Are there written materials that I can repurpose, or do I need to develop new materials?
- Are materials available in languages other than English?
- What resources and channels are available to help spread my messages?

**Customer Service Standards and Community Outreach** [Exit](#)

**Community Outreach and Strategies** Page 11 of 18

### Knowledge Check

You and Adrianne met with scout leaders, nurses, clergy, and consumers at the farmers' market. You've learned about the consumers in your community and the organizations that work with them. You know that they rely on local faith-based organizations and hospitals for information. Still, it's a good idea to gather additional resources and develop an outreach plan that will help you target and reach these consumers.

**Which of the following activities should you and Adrianne do?**

Select **all that apply** and then click **Check Your Answer**.

A. Identify your key audiences by ethnicity/culture, age, and income level, so that you can focus on where they are and how best to communicate with them.

B. Identify other organizations that serve your community and the information you've gathered from them, like contact numbers, availability, and the population groups they currently serve.

C. Assume that local faith-based organizations and hospitals aren't interested in your work and that you don't need to have any of your materials translated.

D. Identify the best ways to reach each audience, like flyers and meetings arranged through faith-based organizations, the local hospital, or social media.

**Check Your Answer**

Click through the activity to enable the NEXT button

[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

### Knowledge Check

You and Adrianne met with scout leaders, nurses, clergy, and consumers at the farmers' market. You've learned about the consumers in your community and the organizations that work with them. You know that they rely on local faith-based organizations and hospitals for information. Still, it's a good idea to gather additional resources and develop an outreach plan that will help you target and reach these consumers.

**Which of the following activities should you and Adrianne do?**

Select **all that apply**.

- A. Identify your key audiences by ethnicity/culture, age, and income level, so that you can focus on where they are and how best to communicate with them.
- B. Identify other organizations that serve your community and the information you've gathered from them, like contact numbers, availability, and the population groups they currently serve.
- C. Assume that local faith-based organizations and hospitals aren't interested in your work and that you don't need to have any of your materials translated.
- D. Identify the best ways to reach each audience, like flyers and meetings arranged through faith-based organizations, the local hospital, or social media.

**Feedback:** The correct answers are A, B, and D. Formally defining key audiences helps you identify how you can best reach consumers who need your help. Identifying and building relationships with community organizations who can help you engage key audiences will help you build an effective outreach strategy.

**Customer Service Standards and Community Outreach** [Exit](#)

**Community Outreach and Strategies** Page 12 of 18

### Identify Your Strengths And Weaknesses

The next step in developing an effective outreach strategy includes reviewing the information you gathered about your audience and other community organizations, and also knowing which tools and skills would help you to successfully implement your outreach strategies. Be sure to identify the strengths and weaknesses of each of these parts of your outreach strategy.

To determine the strengths in your outreach strategy, you should think about:

- The programs and resources that currently exist to support the community in which you work.
- How you can coordinate and integrate your services to further impact the community.
- How you can make the best use of your strengths.

To determine the weaknesses in your outreach strategy, you should ask yourself questions, like:

- Do I have the necessary relationships, including relationships with local media outlets, to ensure my message reaches as many consumers as possible?
- Do I have the necessary tools and messages to meet my community's specific needs for outreach? These could include documents available in alternate formats and in languages other than English.
- How will I fill in any gaps in the community relationships, messages, tools, or skills?
- How experienced are other community organizations in conducting outreach efforts, leading programs, and networking within the community?



[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

### Identify Your Strengths And Weaknesses

The next step in developing an effective outreach strategy includes reviewing the information you gathered about your audience and other community organizations, and also knowing which tools and skills would help you to successfully implement your outreach strategies. Be sure to identify the strengths and weaknesses of each of these parts of your outreach strategy.

To determine the strengths in your outreach strategy, you should think about:

- The programs and resources that currently exist to support the community in which you work.
- How you can coordinate and integrate your services to further impact the community.
- How you can make the best use of your strengths.

To determine the weaknesses in your outreach strategy, you should ask yourself questions like:

- Do I have the necessary relationships, including relationships with local media outlets, to ensure my message reaches as many consumers as possible?

- Do I have the necessary tools and messages to meet my community's specific needs for outreach? These could include documents available in alternate formats and in languages other than English.
- How will I fill in any gaps in the community relationships, messages, tools, or skills?
- How experienced are other community organizations in conducting outreach efforts, leading programs, and networking within the community?

**Customer Service Standards and Community Outreach** [Exit](#)

**Community Outreach and Strategies** Page 13 of 18

### Plan for Outreach

The next step in creating an effective outreach strategy is to develop timelines and fill in any details that are missing from your outreach work plan.

As you create your outreach plan, you should use the lists you've made so far and ask yourself:

- What are the best ways to distribute my materials?
- Am I working with communications methods and groups that are available to help in my community?
- Does my plan reflect significant Marketplace milestones and deadlines, like important enrollment dates?
- Have I included strategies to reach all my key audiences?
- Do I have the appropriate resources to implement my work plan?

Once you answer these questions, you can develop a timeline for your outreach work plan.



[Menu](#) [Help](#) [Glossary](#) [Resources](#) [◀ BACK](#) [NEXT ▶](#)

## Plan for Outreach

The next step in creating an effective outreach strategy is to develop timelines and fill in any details that are missing from your outreach work plan.

As you create your outreach plan, you should use the lists you've made so far and ask yourself:

- What are the best ways to distribute my materials?
- Am I working with communications methods and groups that are available to help in my community?
- Does my plan reflect significant Marketplace milestones and deadlines, like important enrollment dates?
- Have I included strategies to reach all my key audiences?
- Do I have the appropriate resources to implement my work plan?

Once you answer these questions, you can develop a timeline for your outreach work plan.

## Customer Service Standards and Community Outreach

Community Outreach and Strategies

Get Buy-In

After you finalize your strategy and draft your outreach work plan, it's important to make sure you get buy-in and support for your expected outreach activities.

Ask yourself:

- Have I talked with and received support from my organization?
- Have I established relationships with community organizations?
- Have other community organizations agreed to participate in planned activities?

When trying to get buy-in for your outreach work plan, make sure to:

- Communicate often and openly.
- Accept suggestions.
- Ask for help.
- Thank the community organizations that help you.

Page 14 of 18

Exit



Menu   Help   Glossary   Resources   < BACK   NEXT >

## Get Buy-In

After you finalize your strategy and draft your outreach work plan, it's important to make sure you get buy-in and support for your expected outreach activities.

Ask yourself:

- Have I talked with and received support from my organization?
- Have I established relationships with community organizations?
- Have other community organizations agreed to participate in planned activities?

When trying to get buy-in for your outreach work plan, make sure to:

- Communicate often and openly.
- Accept suggestions.
- Ask for help.
- Thank the community organizations that help you.

## Customer Service Standards and Community Outreach

Community Outreach and Strategies

Page 15 of 18

### Track, Monitor, Evaluate, and Refine Your Outreach Activities

Tracking, monitoring, evaluating, and refining your community outreach efforts will:

- Help you know if your plan is working.
- Examine the effects of your outreach in the community.
- Assist you in better identifying the needs of key audiences.
- Ensure you're spending resources (including time) in the right way.
- Identify the most effective strategies and help you build on best practices.
- Provide information to improve your outreach strategies.

Here are some ways to track, monitor, and evaluate your outreach efforts:

- Collect information on the number of consumers that you see each month and/or during each outreach event.
- Compare which outreach events are most effective at reaching your key audiences.
- Create a volunteer survey for consumers to fill out after attending an outreach event to measure effectiveness and gets ideas for improvement.
- Ask consumers how they heard about your organization. Keep a contact log of calls from consumers.

Evaluating your results will help you to refine your plans and strengthen your ability to reach the intended audience.



Menu    Help    Glossary    Resources    BACK    NEXT

### Track, Monitor, Evaluate, and Refine Your Outreach Activities

Tracking, monitoring, evaluating, and refining your community outreach efforts will:

- Help you know if your plan is working.
- Examine the effects of your outreach in the community.
- Assist you in better identifying the needs of key audiences.
- Ensure you're spending resources (including time) in the right way.
- Identify the most effective strategies and help you build on best practices.
- Provide information to improve your outreach strategies.

Here are some ways to track, monitor, and evaluate your outreach efforts:

- Collect information on the number of consumers that you see each month and/or during each outreach event.
- Compare which outreach events are most effective at reaching your key audiences.
- Create a volunteer survey for consumers to fill out after attending an outreach event to measure effectiveness and gets ideas for improvement.
- Ask consumers how they heard about your organization. Keep a contact log of calls from consumers.

Evaluating your results will help you to refine your plans and strengthen your ability to reach the intended audience.

## Customer Service Standards and Community Outreach

Community Outreach and Strategies

Page 16 of 18

### Keeping Up with Marketplace News and Information

When communicating with consumers, it's important to have the latest, most accurate information available. Sign up for updates directly through HealthCare.gov for the most up-to-date Marketplace information. Be sure to check out the videos and other resources available on Marketplace.CMS.gov. CMS will also share updates during the weekly webinars and newsletters to keep you up to date. Other resources that are tailored to specific state issues, like local nonprofit groups, may also be helpful.

You can keep up with the latest Marketplace news through other social media channels, including:

- **YouTube:** Watch [youtube.com/user/HealthCareGov](https://youtube.com/user/HealthCareGov) for videos highlighting important information about the Marketplaces.
- **Facebook:** "Like" [facebook.com/HealthCare.gov](https://facebook.com/HealthCare.gov) and share your thoughts.
- **Twitter:** Follow [@HealthCareGov](https://twitter.com/@HealthCareGov) on Twitter for up-to-date Marketplace news.
- **Google+:** Use Google+ to follow [HealthCare.gov](https://plus.google.com/+HealthCare.gov).

You can also share these links and encourage consumers to visit these sites.



Menu   Help   Glossary   Resources   < BACK   NEXT >

### Keeping Up with Marketplace News and Information

When communicating with consumers, it's important to have the latest, most accurate information available. Sign up for updates directly through HealthCare.gov for the most up-to-date Marketplace information. Be sure to check out the videos and other resources available on Marketplace.CMS.gov. CMS will also share updates during the weekly webinars and newsletters to keep you up to date. Other resources that are tailored to specific state issues, like local nonprofit groups, may also be helpful.

You can keep up with the latest Marketplace news through other social media channels, including:

- **YouTube:** Watch [youtube.com/user/HealthCareGov](https://youtube.com/user/HealthCareGov) for videos highlighting important information about the Marketplaces.
- **Facebook:** "Like" [facebook.com/HealthCare.gov](https://facebook.com/HealthCare.gov) and share your thoughts.
- **Twitter:** Follow [@HealthCareGov](https://twitter.com/@HealthCareGov) on Twitter for up-to-date Marketplace news.
- **Google+:** Use Google+ to follow [HealthCare.gov](https://plus.google.com/+HealthCare.gov).

You can also share these links and encourage consumers to visit these sites.

The screenshot shows a knowledge check section titled "Knowledge Check". It asks: "Rafael is an Assister and is developing a strategy for his community outreach efforts. Which of the following activities should he include to ensure he creates a successful outreach strategy? Select all that apply and then click Check Your Answer." Below are four options: A. Get buy-in, B. Identify his strengths and weaknesses, C. Monitor and evaluate his outreach activities, and D. Identify his competitors. At the bottom left is a "Check Your Answer" button. A note says "Click through the activity to enable the NEXT button". Navigation buttons at the bottom include "Menu", "Help", "Glossary", "Resources", "< BACK", and "NEXT >".

## Knowledge Check

Rafael is an Assister and is developing a strategy for his community outreach efforts.

**Which of the following activities should he include to ensure he creates a successful outreach strategy?**

Select all that apply.

- A. Get buy-in.
- B. Identify his strengths and weaknesses.
- C. Monitor and evaluate his outreach activities.
- D. Identify his competitors.

**Feedback:** The correct answers are A, B, and C. Rafael should plan to get buy-in, identify his strengths and weaknesses, and monitor and evaluate his outreach activities as part of his outreach strategy. Identifying his competitors isn't part of a successful outreach strategy.

**Customer Service Standards and Community Outreach** [Exit](#)

**Community Outreach and Strategies** Page 18 of 18

**Key Points**

- Developing an outreach strategy will help you effectively reach consumers in your community and educate them about their health coverage options.
- You should identify audiences within your community and build your outreach strategy according to their unique needs.
- Your outreach strategy should incorporate ways to engage community organizations to help reach key audiences, as well as goals and benchmarks for tracking progress.
- Evaluating your outreach strategy will help you build on best practices and identify ways to improve your strategy in the future.
- You aren't alone. There are many other organizations doing this work that can provide resources and help with outreach planning and best practices.

You've successfully completed this course.

Click **EXIT** to leave the course.

[Menu](#) [Help](#) [Glossary](#) [Resources](#) [BACK](#)

## Key Points

- Developing an outreach strategy will help you effectively reach consumers in your community and educate them about their health coverage options.
- You should identify audiences within your community and build your outreach strategy according to their unique needs.
- Your outreach strategy should incorporate ways to engage community organizations to help reach key audiences, as well as goals and benchmarks for tracking progress.
- Evaluating your outreach strategy will help you build on best practices and identify ways to improve your strategy in the future.
- You aren't alone. There are many other organizations doing this work that can provide resources and help with outreach planning and best practices.

You've successfully completed this course.

## Customer Service Standards and Community Outreach Resources

### **CuidadoDeSalud.gov**

The Spanish counterpart to HealthCare.gov that serves as a resource where Spanish speaking consumers can create a Marketplace account and access information about health coverage and the Health Insurance Marketplace<sup>SM</sup>.

<https://www.cuidadodesalud.gov/es/>

### **HHS Office of Minority Health Resource Library**

A library of resources available on the OMH website.

<https://hclsig.thinkculturalhealth.hhs.gov/Content/Library.asp>

### **Marketplace.CMS.gov**

Official CMS website offering information and resources on the Health Insurance Marketplaces.

<https://marketplace.cms.gov/>

### **HealthCare.gov Facebook Page**

Official HealthCare.gov Facebook page providing consumers with real-time updates and information about health coverage through the Marketplaces.

<https://www.facebook.com/healthcare.gov>

### **HealthCare.gov Twitter Page**

Official HealthCare.gov Twitter page providing consumers with real-time updates and information about health coverage through the Marketplaces.

<https://twitter.com/HealthCareGov>

### **Getting Help in a Language other than English**

A CMS document that provides instructions for accessing the Marketplace Call Center written in the major languages spoken in the United States (U.S.).

<http://marketplace.cms.gov/outreach-and-education/getting-help-in-a-language-other-than-english.pdf>