



Policy: MA.4009
Title: **Member Orientation**
Department: Customer Service
Section: Not Applicable

CEO Approval: /s/ Michael Hunn 10/10/2024

Effective Date: 06/01/2005
Revised Date: 10/01/2024

Applicable to: ☐ Medi-Cal
☒ OneCare
☐ PACE
☐ Administrative

I. PURPOSE

This policy defines the process for scheduling, conducting, evaluating, and revising the Member orientation for the CalOptima Health OneCare program.

II. POLICY

- A. CalOptima Health shall provide OneCare Members with a Member orientation and educational program designed to promote appropriate and timely receipt of Covered Services and a higher level of satisfaction with the Member's health care delivery system.
- B. CalOptima Health shall conduct Member orientations monthly, January through November. The orientation shall provide Members with an overview of OneCare and information on:
 - 1. A Member's benefits, rights and responsibilities, in accordance with CalOptima Health Policy MA.4001: Member Rights and Responsibilities;
 - 2. Material covered in the OneCare Member Handbook, pursuant to CalOptima Health Policy MA.4007: Member Disclosures;
 - 3. Benefits not administered by OneCare; and
 - 4. Other important information to assist Members in understanding and accessing benefits.

III. PROCEDURE

- A. CalOptima Health shall conduct Member orientations in all Threshold Languages.
 - 1. Upon a Member's request, CalOptima Health shall make Member orientations available in non-Threshold Languages, including American Sign Language (ASL), using interpreter services.
 - 2. A Member may request an American Sign Language or non-Threshold Language interpreter by noting such request on the Member Orientation R.S.V.P. Form, or by calling the OneCare Customer Service Department or the Teletypewriter (TTY) line not less than seven (7) business days prior to the scheduled orientation.

- B. Upon a Member's request, CalOptima Health may conduct an individual Member orientation in person or by telephone.
 - 1. CalOptima Health shall make the decision to conduct an orientation in person or by telephone on a case-by-case basis.
 - 2. CalOptima Health may conduct an individual Member orientation in a non-Threshold Language utilizing interpreters. If an appropriately bilingual staff is unavailable, CalOptima Health staff may utilize a contracted vendor for interpreter services to conduct the individual Member orientation.
- C. CalOptima Health shall include a Member Orientation R.S.V.P. Form in all Threshold Languages in the new Member welcome packet, with a self-addressed, prepaid postage, return envelope.
- D. CalOptima Health shall invite a Member to an orientation as the Member's needs for information or education regarding OneCare comes to the attention of the OneCare Customer Service Department and other OneCare staff.
- E. OneCare Customer Service shall conduct the Member orientation.
- F. CalOptima Health shall encourage a Member's caregivers, assistants, parents, and family to attend the Member orientation with the Member.
- G. Providers, staff, associated agencies, or community-based organizations may attend a Member orientation.
- H. CalOptima Health shall provide an anonymous method for a Member in attendance to evaluate the Member orientation and assess their understanding of the benefits and services presented.
- I. CalOptima Health shall maintain the Member orientation schedule on CalOptima's Website at: www.caloptima.org

IV. ATTACHMENT(S)

- A. OneCare Complete_2025 NMO RSVP Form
- B. OneCare Flex Plus_2025 NMO RSVP Form

V. REFERENCE(S)

- A. CalOptima Health Policy MA.4001: Member Rights and Responsibilities
- B. CalOptima Health Policy MA.4007: Member Disclosures

VI. REGULATORY AGENCY APPROVAL(S)

None to Date

VII. BOARD ACTION(S)

None to Date

VIII. REVISION HISTORY

Action	Date	Policy	Policy Title	Program(s)
Effective	06/01/2005	MA.4009	Member Orientation	OneCare
Revised	01/01/2008	MA.4009	Member Orientation	OneCare
Revised	08/01/2012	MA.4009	Member Orientation	OneCare
Revised	07/01/2015	MA.4009	Member Orientation	OneCare
Revised	07/01/2016	MA.4009	Member Orientation	OneCare
Revised	08/01/2017	MA.4009	Member Orientation	OneCare
Revised	07/01/2018	MA.4009	Member Orientation	OneCare
Revised	04/01/2019	MA.4009	Member Orientation	OneCare
Revised	01/01/2020	MA.4009	Member Orientation	OneCare
Revised	02/01/2022	MA.4009	Member Orientation	OneCare
Revised	10/01/2023	MA.4009	Member Orientation	OneCare
Revised	10/01/2024	MA.4009	Member Orientation	OneCare

IX. GLOSSARY

Term	Definition
Covered Service	Those medical services, equipment, or supplies that CalOptima is obligated to provide to Members under the Centers of Medicare & Medicaid Services (CMS) Contract.
Member	A beneficiary enrolled in the CalOptima Health OneCare program.
Provider	Any Medicare provider (e.g., hospital, skilled nursing facility, home health agency, outpatient physical therapy, comprehensive outpatient rehabilitation facility, end-stage renal disease facility, hospice, physician, non-physician provider, laboratory, supplier, etc.) providing Covered Services under Medicare Part B. Any organization, institution, or individual that provides Covered Services to Medicare members. Physicians, ambulatory surgical centers, and outpatient clinics are some of the providers of Covered Services under Medicare Part B.
Threshold Languages	A threshold language is defined by CMS as the native language of a group who comprises five percent (5%) or more of the people served by the CMS Program.