

**Family Planning Medicaid Waiver Evaluators Conference Call  
MINUTES  
February 9, 2009 1:00 – 2:00 pm EST**

**Participants (who identified themselves, several others joined later)**

**Evaluators:** Janet Bronstein (AL); Jeff Roth (FL); Kathy Vetter (IL); Andrea Johnson, Bo Martin (NC); Dave Murday (SC); Donna Albright, Michelle Bensenberg, Aradhana Sathiadevan, Kendra Sippel (TX); Gerald Craver (VA)

**State Staff:** Catherine McGrath, Susan McNamara, Karen Jackson (FL); Tysha David, Marcia Swartz (NC); Margaret Major (TN);

**Other:** Adam Sonfield (Guttmacher Institute); Julie DeClerque and Ellen Shanahan (Sheps Center RNDMU Project); Priscilla Guild (Sheps Center Research Fellow)

The February call began with a welcome to several new people who are joining the group: Michelle Bensenberg, Aradhan Sathiadevan, Donna Albright, and Kendra Sippel from the Women's Health Program at the Texas Health and Human Services Commission. They are all working on the waiver evaluation (two years old now) and very interested in the question of primary care referrals and how to monitor and track these data. And Gerald Craver, a policy analyst with the VA Dept of Medical Assistance Services, is helping Virginia with their waiver evaluation. Welcome everyone.

Dave Murday opened with a discussion of the new website for our group that has been set up for review. The new website can be found at [www.shepscenter.unc.edu/Rndmu](http://www.shepscenter.unc.edu/Rndmu). Since we have a growing number of participants, the website is a way to share information efficiently and bring new group members up to date. Currently, there are two sections: one public and one restricted to conference call participants who have the userid and password. There are six subsections in the "public" area. These include (1) a listing of topics discussed on previous calls, (2) FP waiver-related publications and presentations, (3) common indicator definitions developed by the group over time, (4) strategies for outreach and improving utilization, (5) renewal applications and reports, and (6) sample FP waiver evaluation designs. The latter application materials and evaluation designs must be approved by states in advance of their being posted to the publicly accessible webpage. The second section of the website is a restricted group of files. Decisions about who will have access to these files will be left up to each state, locally.

**Topic:** New Website A number of comments and suggestions were made

1. Location of website within Sheps RNDMU women's and children's health data project is good in that it depoliticizes the topic and places it in the context of women's and infant health — however it also may be difficult to find for someone who is surfing the web for information on Medicaid waivers and their evaluations. Suggestions included:

- Investigating HTML language and linkages to increase "visibility" (Update: We have confirmed that the site is now registered with the google, yahoo, and ms live search sites. It will take a bit of time for their web crawlers to index the site. The best thing to increase visibility is for [us as] users to actually add a link to this new site on an appropriate page of our individual

- agencies; use this as the link: <http://www.shepscenter.unc.edu/data/Rndmu/>. The web crawlers index the pages and words on the pages and nested pages, so it appears to be unnecessary to add tags or keywords.)
- Adding brief explanations or descriptions under each item, add word “Medicaid” under Family Planning Waiver Evaluation Materials (Update: We have the text completed and are figuring out how to upload it).
2. Providing contact lists, one for the public section that listed a program and a data contact, and a second list in the private section listing contact info for group participants. A roster for everyone to complete and return will be circulated with the minutes. (Update: Please see attached, fill in, and return to [ellen\\_shanahan@unc.edu](mailto:ellen_shanahan@unc.edu)).
  3. Add several key publications/links: Waiver overview article, multi-state evaluation done by CNA, link to Guttmacher’s “late breaking news” section and key articles related to waivers (Adam volunteered to help with this)
  4. Move minutes to public section, link list of topics discussed to relevant minutes
  5. Organize “Work in Progress” section by issue or category, so items are grouped; add dates to documents to help distinguish version.

We spent the rest of the call reviewing several of the benchmarking topics that have been on the table for several months: (a) primary care referrals, (b) participation levels, reimbursements and fees/provider mix, and (c) common indicator definitions.

**Topic: Primary Care Referrals**

Reporting on primary care referrals for waiver clients is an item that is required of all FP waiver evaluations. Several questions have been raised and discussed on past calls. There is continuing interest in this topics on the part of program managers, as well as the evaluators, and... CMS (Lane Terwilliger, Esq the new person in charge of the 1115 FP Waivers at CMS) explicitly asked us for suggestions on this as she has had requests from others who are having difficulties with this requirement. This will be the topic of our March call. Dave Murday will send out a request asking each state to send materials addressing:

- How does your state define a “primary care referral”?
- What is your state doing to track referrals for primary care for FP waiver clients?
- Which methodologies seem to be most practical and effective? (NC has been doing focus groups, AL has been doing telephone and consumer surveys and has shared some of the survey questions with SC)
- How do findings vary with different modes of data collection?

**Topic: Service Reimbursements, Participation Levels, and Provider Mix**

How similar are reimbursement rates for “standard” services across programs/states and how does it impact public/private provider participation and numbers of clients served? (That is ultimately part of what we want to determine). Even if we only have data from several states we decided this would still be useful, as long as we understand the profile of the programs and how they differ from each other. For example, in the different ways that a state delivers services and their public/private provider mix “profile”). Why are some states having better luck getting and keeping private providers involved in their waiver programs than others? To what extent is this a factor in the success of a program? We need a brief description of each State’s program and how the waiver fits in with other FP services, esp Title X. Kathy Vetter

(IL) and Kim Dauner (SC) have looked at a profile of a Waiver program for Title X and Health Dept's and are working on developing the template for each State to fill in. They will email it out to the group once available, and Kathy will add instructions about how it should be completed. Thank you, Kathy and Kim!

**Topic:** Definitions for Common Indicators – Refining and Updating

Finally, the group decided we needed an overall framework to consolidate our comparative information to help us see what we have so far and what we still need to tackle. Dave Murday (SC), Jeff Roth (FL) and Kim Dauner (FL) volunteered to do this task for the group. Dave challenged the newer members of the group to be thinking about what topics or needs they might have that would be useful for them in their programs, and bring their thoughts to the group next month (or send now to Dave at [murday@gwm.sc.edu](mailto:murday@gwm.sc.edu) or [murday@sc.edu](mailto:murday@sc.edu)).

Action #1: Send your State's information about how you evaluate primary care referrals in your program to either [Ellen\\_Shanahan@unc.edu](mailto:Ellen_Shanahan@unc.edu) or [Julie\\_DeClerque@unc.edu](mailto:Julie_DeClerque@unc.edu) as soon as possible so it can be uploaded to the private section of our group's new website in time for everyone to review before the March 9<sup>th</sup> call. See separate email from Dave Murday sent 2/9 for details.

Action #2: Contact Kathy Vetter ([kvette1@uic.edu](mailto:kvette1@uic.edu)) if you are interested in joining the workgroup investigating different provider types. Kathy has the details.

Action #3: Each state should continue to email the following to the Sheps Center. These will be posted on the new Website, as described above:

1. Final Waiver Evaluation Plan for your state
2. Annual Summary Report for your program
3. Papers, presentations, or ancillary reports related to FP waiver activities or evaluation
4. Survey tools, questionnaires that may be useful to fellow FP waiver evaluators
5. Anything else you think would be appropriate to share

Please send to [Ellen\\_Shanahan@unc.edu](mailto:Ellen_Shanahan@unc.edu). Make sure any documents being sent have State clearance for distribution to the group. The website is ready for viewing. You will need a username and password for the workgroup files.

**Next Call:** March 9<sup>th</sup> from 1 until 2 PM EDT. The call-in number for all the calls is (919) 962-2740.