

**Family Planning Medicaid Waiver Evaluators Conference Call
MINUTES**

March 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 and Bo Martin (NC); Kim Dauner and Dave Murday (SC); Michelle Bensenberg, Aradhana Sathiadevan, Marianna Gomez and Kendra Sippel (TX);

State Staff: Kris-Tena Albers, Kathy Canfield, Karen Jackson, Susan McNamara and Janet Temkin (FL); Tri Tran (LA); Bernie Operario and Marcia Swartz (NC); Margaret Major (TN);

Other: Mary Beth Hance and Lane Terwilliger (CMS); Adam Sonfield (Guttmacher Institute); Julie DeClerque and Ellen Shanahan (Sheps Center); Priscilla Guild (Sheps Research Fellow)

Dave Murday opened the March call with a discussion of referrals for primary care given to Title X clinic patients by their providers. Reporting on primary care referrals for waiver clients is an item that is required of all FP waiver evaluations. After the February call, Dave Murday sent out a request asking each state to send materials addressing:

- How each state defines a “primary care referral”?
- What each state is doing to track referrals for primary care for FP waiver clients?
- Which methodologies seem to be most practical and effective?
- How do findings vary with different modes of data collection?

The rest of the call was dedicated to discussing information sent in by NC, SC, AL, TX, VA, WI (see attached file with each state’s information or go to website: www.shepscenter.unc.edu/Rndmu and look at FP Waiver Evaluation Workgroup “work in progress” files (Primary Care Referral State Materials).

Brief summary of key points:

- Methodology used: NC has been doing focus groups with women and mailed surveys to men; AL has been doing annual telephone and consumer surveys, SC has used some of the same survey questions as AL. VA has conducted telephone consumer surveys, mailed provider surveys and in-person key informant interviews.
- Despite issues and concerns about validity and reliability (see esp TX Table 1), cost, and confidentiality of mailed surveys, they provide better data than focus groups and are generally more successful approach. SC estimates that survey cost is \$10K.
- Most everyone is seeing decline in # referrals being made, but may be part of downward trend overall in # enrollees, or due to factors outside scope of waiver evaluation.
- AL, VA, SC, and FL all report similar findings: only 18-20% of FP clients needed primary care referral; TX estimates much lower (7-12%). Among those needing referral, most

getting care (65 - 75%+), and among those who don't get care, main reason cited is lack of insurance or ability to pay.

- Women enrolled in waiver more likely to have usual source of care than those eligible but not enrolled (VA, AL, SC)
- OPA study (AL and AK) shows that (1) if FP provider encounters "other" or acute medical problem in patient, they are generally more likely to treat on the spot (as unpaid service) rather than refer; and (2) giving the FP provider a list of free clinics in local service area increases likelihood of a referral being offered to client.
- Question about intent of requirement to track PC referrals: Was it due to states pushing back on referral efforts because lack of available services and therefore intent was to document unmet need as part of the demonstration? Or possibly need to add component to justify continued "demonstration" status of waiver?

Topics for future discussion: Definitions for Common Indicators – Refining and Updating

In our February meeting, 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 or murday@sc.edu).

On-Going 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. Name and contact information for your state's evaluator (program and data person)

Please send to Ellen_Shanahan@unc.edu. Make sure any documents being sent have State clearance for distribution to the group. The website is ready for viewing. User name and passcode for the private section of the site is available through each state's contact. See website for list of names and contact information.

Next Call: Monday, April 13th from 1 until 2 PM EDT. The call-in number for all the calls is (919) 962-2740.