



Department of Health Care Services  
**BULLETIN 2020-001**

**DATE:** 03/09/2020 (Revised 11/15/2022)  
**TO:** All Participating Counties  
**FROM:** Medi-Cal Health Enrollment Navigators Project (Navigators Project)  
**SUBJECT:** Permissible and Excluded Activities (Revised)

The Department of Health Care Services (DHCS) is providing guidance to clarify the activities a county or a county acting jointly with community-based organizations (CBO) may include as part of their outreach, enrollment, and retention efforts using Navigators Project allocations.

If the organization entered into a Privacy and Security Agreement (PSA) with DHCS, the following activities are permissible/excluded under the organization's current agreement:

<b>Activities Under the PSA</b>	
<b>Permissible</b>	<b>Excluded</b>
<p>Enrollment:</p> <ul style="list-style-type: none"><li>- Translation activities related to enrollment or navigation services.</li><li>- On-site resource during outreach efforts.</li><li>- Conduct presentations and educate public at outreach events.</li><li>- Assist the beneficiary or answer questions to help complete an application.</li><li>- Assist with completing the Medi-Cal application and related forms. (Paper or electronic format)</li><li>- Assist with explaining, obtaining, and/or making required verifications for points of Medi-Cal eligibility available to the county Medi-Cal eligibility staff.</li></ul>	<p>Enrollment:</p> <ul style="list-style-type: none"><li>- Case processing for eligibility determinations or terminations.</li></ul>

<p>Retention:</p> <ul style="list-style-type: none"> <li>- Cold calls/outreach to beneficiaries due for redetermination.</li> <li>- Cold calls/outreach to beneficiaries who have been discontinued during redetermination, only during the ninety (90) day cure period.</li> <li>- Assist with completing Medi-Cal redetermination forms. (Paper or electronic format)</li> <li>- Assist with explaining, obtaining, and/or making required verifications for points of Medi-Cal eligibility available to the county Medi-Cal eligibility staff.</li> </ul>	<p>Retention:</p> <ul style="list-style-type: none"> <li>- Case processing for eligibility redeterminations or terminations.</li> </ul>
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<b>Activities Under the PSA (continued)</b>	
<b>Permissible</b>	<b>Excluded</b>
<p>Navigation:</p> <ul style="list-style-type: none"> <li>- Translation activities related to enrollment or navigation services.</li> </ul>	<p>Navigation:</p> <ul style="list-style-type: none"> <li>- Assistance in assessing the best program options and identifying medical providers.</li> <li>- Coordinate mental, medical and dental care visits.</li> <li>- Provide assistance in accessing care including mental, medical and dental services.</li> <li>- Provide transportation services to mental, medical, and dental care visits.</li> </ul>

If the organization has entered into a Business Associate Addendum (BAA) with DHCS, the following activities are permissible/excluded (in addition to the Enrollment and Retention activities listed above):

<b>Activities Under the BAA</b>	
<b>Permissible</b>	<b>Excluded</b>
<p>Navigation:</p> <ul style="list-style-type: none"> <li>- Assistance in assessing the best program options and identifying medical providers.</li> <li>- Coordinate mental, medical and dental care visits.</li> <li>- Provide assistance in accessing care including mental, medical and dental services.</li> </ul>	<p>Navigation:</p> <ul style="list-style-type: none"> <li>- Provide transportation services to mental, medical, and dental care visits.</li> </ul>