

Promising Practices in Virtual and Socially Distanced Appointments and Events from the Connect for Health Colorado Assistance Network – Fall 2020

Virtual

- Appointments
 - Use webinar software to host a virtual appointment with the customer. Let customers know in advance if they will be able to use their computers/laptops or smartphones for the appointment.
 - If a customer does not have the ability to do a virtual appointment but would still like your support during the eligibility and enrollment process, you and the customer can do a three-way call with the Connect for Health Colorado Customer Service Center (CSC). This will allow the CSC representative to enter data on behalf of the customer into the application.
 - Check with existing partners in both cities and outlying communities to see if they are willing to allow their customers who do not have access to technology to complete a virtual appointment with you from their offices.
 - Allow additional time during the appointment to support the customer in using new webinar technology and understanding how to sign any necessary documents virtually. Utilizing screen sharing and giving the customer remote access to sign documents is a best practice.
 - If customers request an in-person appointment, call them to see if they would be able to do a virtual appointment instead to decrease health risk for both you and customer.
 - Email the customer relevant health insurance literacy materials and enrollment confirmation documents after the appointment.
- Events
 - Use webinar software to host a virtual event by using the “waiting room” feature so you can let the next customer into the meeting “room” as soon as you have completed the appointment with your last customer. This allows customers to be “lined up” but prevents them from accidentally joining another appointment.

- Staff should utilize available tools to stay in communication as a team throughout the event (i.e., using private messaging software).
- For virtual “walk-in” events, have customers contact a receptionist during the hours of the event who can then pass their information on to you and other staff supporting the event. Once you and/or other staff have finished with a customer, you/they can contact the next customer “in line” to begin a virtual appointment based on information provided by the receptionist. This approach is similar to the “call back” feature the Connect for Health Colorado CSC provides.

Socially Distanced

- Organizations that have been able to successfully continue seeing customers on-site have done the following:
 - Have customers contact staff from the parking lot when they are ready for their appointment to ensure not too many customers are in the building at one time.
 - Ensure every customer’s temperature is taken and they complete a symptom questionnaire before entering the building.
 - Consider completing the questionnaire over the phone with the customer before they come in.
 - Provided masks and hand-sanitizer stations or gloves to customers and staff.
 - Put Plexiglass barriers on desks between customers and staff with the ability to pass paperwork around, under or through.
 - Spaced staff desks more than six feet apart. This included repurposing common areas so that desks could be appropriately spaced or only allowed so many staff to be conducting appointments in one area at one time.
 - Saw customers in conference rooms or other areas where staff and customers could stay at least six feet apart.
 - Setup a computer and phone in one office for the customer and had staff be on a computer and a phone in another office.
 - In this way, a “virtual” appointment could occur in the organization’s office for those customers who may not have access to technology.
 - Thoroughly clean the customer office in between customers.

Supporting Staff

- Provide work cell phones to staff so their numbers can be advertised out in marketing and given to customers for direct staff contact.
- Ensure staff have work laptops and hotspots they can use from home to ensure proper technology and connectivity.

- For organizations who are working to bring staff back into the office, consider increasing the number of times per week that the cleaning staff cleans the office.
- Stagger which days of the week staff members are in the office to ensure more staff stay healthy if there is an exposure, as well as allowing for easier social distancing.

Note: All accommodations should be made while still keeping Health Insurance Portability and Accountability Act (HIPAA) and other privacy and security best practices in mind. You should only meet with customers and partners in-person as you feel comfortable and in accordance with local public health guidelines.