

The Resource Exchange CMA Community Advisory Committee (CAC)

Microsoft Teams Meeting

Link provided in email invite.

1/24/2025

COMMITTEE MEMBERS In Attendance

- TRE-Kyle Cox, Laura Thomas, Samantha Winter
- David Pump
- Stephanie Garcia
- Tracy Hiester
- Jenna Wolfe
- Jim Ruwwe
- Bonnie Kniffin
- Christina Butero

1. Welcome and Overview of Agenda

- I. TRE presentation and overview of backlog progress, visual overview of TRE's progress and status of key case management activities.
- II. TRE presentation and overview Q2 complaint log, trend analysis, visual representations.
- III. TRE presentation and overview of exception requests, process for decision making, and review of current exception decisions.

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2. Open Forum – Committee member Analysis & CMA Leadership Advisory

- I. The committee expressed concern that TRE is still showing trends in the areas of complaints (lack of follow-up/responsiveness) of mainly unreturned phone calls-basic service principles.
 - a. The committee recommended TRE leadership complete an in-depth review of the functional tasks of all case managers and ensure case managers have manageable work tasks with plenty of time to incorporate communication service to members and potential members. Multiple members highlighted that a 2–3-week response time is not acceptable.
 - b. TRE Supervisors also need to have a reasonable workload with plenty of time to work on problem solving, staff coaching and response times.
 - c. The committee was concerned at the amount of time it is taking TRE to get case managers to a 1:65 ratio in terms of member caseloads, and recommended prioritization. The committee also questions if 1:65 is even a manageable number for case managers to be able to provide good service and communication.
 - d. The committee recommend TRE continue to prioritize hiring and recruitment, as retention has been approved statistically, the community is still feeling the results of TRE being understaffed (mostly with responsiveness, communication, and training).
 - i. The committee recommended that retention and turnover must continue to evolve and improve. The community feels concerned about the number of case managers a member will have, constantly changing. A real-world example was given of 6 different case managers being assigned to a member over a 12-month period. The concern was brought to TRE's attention that it can be difficult for families/members to have a relationship or even know who to call for case management services.
- II. Training-The committee reports a gap in TRE case manager knowledge of key case management components that are noticeable to the community. The group discussed TRE's training plans vs. HCPF outlined trainings.
 - a. Several committee members requested and recommended TRE's training team present to the CAC to discuss TRE's training philosophy, methods, approach, trainings offered and solicit discussion, advice and answer committee questions.

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- b. The committee recommended in-depth customer service & complaint management training. The committee has noticed occurrences where case managers take complaints personally (report feeling targeted) and cause a relationship issue with members, advocates and providers.
 - c. The committee recommended ongoing and person-centered training on complaints and documentation due to ongoing concern that all TRE complaints are not being documented on the complaint log.
 - d. Guardianship/person centered training-guardians need to be notified and included in case management meetings.
 - e.
- III. Case Manager/Member Communication
- a. The committee expressed concern around case manager communication.
 - i. Avoiding cold calls for important case management activities
 - ii. Using appointment times with families/members
 - iii. Responsiveness even when a problem cannot be immediately solved.
 - iv. Training on case management activities.

3. Wrap Up/Next Steps

- Next Meeting Date and Time: April 25, 2025, 9 AM
- Kyle expressed gratitude towards CAC members, encouraged ongoing communication between quarterly meetings and will partner with CAC members on membership and recruitment prior to the next scheduled meeting.